Sense

The 95th consecutive issue in a series of periodicals devoted to strategic communications issues affecting top management

Creating the Preeminent Global Brand

How the Leaders Do It

SIEMENS

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Creating the Preeminent Global Brand — How the Leaders Do It

Some symbols are recognized the world over — the Eiffel Tower, the Great Wall, the Colosseum. Nowadays, however, the icons of the modern age mingle with history's landmarks. And so it goes that Mercedes Benz, Tommy Hilfiger, McDonald's and UPS are as easily distinguishable to citizens of the global village as the Statue of Liberty — whether you're from Rome, Georgia or Rome, Italy.

Clearly, the **age of the preeminent global brand** is upon us. But putting your brand out there in far-flung locales doesn't begin to guarantee its status as a global brand. In this, our 95th issue of *Sense*, we explore the essence of what makes a brand truly global with the leadership of three vastly different companies, who share a worldwide respect for the way they have successfully cultivated and grown their brands.

What our guest companies — The Coca-Cola Company, Siemens AG and Starbucks Coffee Company — also have in common is **a passionate commitment to the integrity of their brands.** Each has a keen understanding of the essential attributes that constitute the distinctive personality and appeal of their brands — and their CEOs are nothing short of zealous in protecting what they view as their companies' most treasured assets.

Stick to the fundamentals is a phrase often heard in the markets. What we learned in our interviews is that the same principle applies to managing a great global brand as well. We were struck by the similarities in what each CEO viewed as fundamental to managing a global brand.

First, no brand ever made it to prominence without **hands-on commitment and passion from the top.** The in-depth knowledge of not only strategic but also anecdotal brand detail displayed by our participating CEOs was most impressive. There is no brand facet too incidental for these chief executives.

A clearly defined brand message resides at the core of Coca-Cola, Siemens and Starbucks. For more than 100 years, M. Douglas Ivester tells us, "Coca-Cola has been positioned to contribute to fun times, to making life a little better, a little lighter, a little more enjoyable…part of that brilliance was to position Coke as more than a soft drink."

A culture that stays focused yet adaptable to changing conditions has been a hallmark of Siemens AG over its 151-year history. Dr. Heinrich von Pierer credits the company's core values with having "helped us survive enormous adversities [and] expand our operations around the globe…Our culture guarantees the balance between continuity and change…We see change not as a threat to our enduring values, but rather as a prerequisite for our continued success."

Compared in age with Coca-Cola and Siemens, Starbucks may be a mere yearling, but it illustrates **the integral role passion plays in building a brand and cultivating a loyal following.** "The most powerful and enduring brands are built from the heart…Their foundations are stronger because they are built with the strength of the human spirit…If people believe they share values with a company, they will stay loyal to a brand," says Starbucks CEO Howard Schultz.

Flexibility to accommodate the brand to local customs, Mr. Ivester explains, is also key. "We do allow our people, through consumer research, to tailor [the brand's] image so that Coca-Cola becomes a part of the fabric of a particular society."

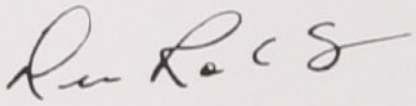
Paying close attention to **extending the brand's positioning to the point-of-purchase** has made Starbucks the universal "third place between home and work" and given the company "a unique advantage over most other consumer brands — we are both a place and a product you consume," says Mr. Schultz.

Finally, Dr. von Pierer, whose company has a comprehensive, worldwide corporate design system, articulates an appreciation of **design as a strategic brand tool** in maintaining a consistent global image. "It gives everything we do, from product design to...building architecture, a highly distinctive look of quality — the visual counterpart to the exacting, consistent standards to which all of our businesses work...Around the world, the system reminds customers who they are doing business with and why."

In this issue, we update you on our proprietary **strategies for building brand equity** developed in concert with Mercer Management Consulting, one of our family of companies, and on our recent expansion into the **burgeoning Latin American marketplace.** We also offer our viewpoint on the **powerful role design plays in creating memorable brands**, and present our thinking about **managing identity and image in cyberspace,** the newest communications frontier.

With more than 50 years of consulting and well over 3,000 client programs behind us, we suggest some tried and true tips on **how to orchestrate a successful brand identity program.** And, in what we hope will be a useful glossary, we share the vocabulary of identity management, which has grown out of the term, corporate identity, coined by our founders, expanding along with the demands of global brand requirements.

As always, we welcome your comments and suggestions about the content of this issue of *Sense*, or on any aspect of brand identity and management practices.



Kenneth J. Roberts
Chairman and Chief Executive Officer, Lippincott & Margulies

STARBUCKS COFFEE COMPANY

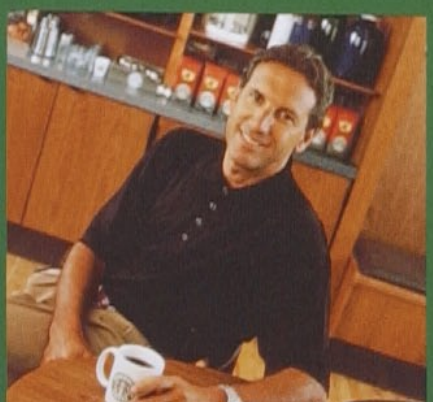
Global Coffee to Go

"Our strategic plan is to be the most recognized brand of coffee in the world and to make the **STARBUCKS** experience a special one wherever our stores may be."

HOWARD SCHULTZ, CHAIRMAN AND CEO, STARBUCKS COFFEE COMPANY

In 1983, Howard Schultz had an epiphany on the streets of Milan that would forever change the way the world takes its coffee. His vision — to translate the Italian coffee bar culture for an American audience and, ultimately, the global consumer — has resulted in Starbucks Coffee Company's emergence as the world's premier specialty coffee retailer, roaster and brand.

In his 1997 book *Pour Your Heart Into It*, Mr. Schultz writes, "Our ambitious long-term goal is to become an enduring great company, with the most recognized and respected brand in the world, known for inspiring and nurturing the human spirit."



A respected philanthropist, Mr. Schultz used profits from his book to create the Starbucks Foundation, which promotes literacy causes across the country. In 1994, Mr. Schultz received the prestigious Business Enterprise Trust Award for courage, integrity and social vision in business, and in 1996 he was the recipient of the International Humanitarian Award for CARE.

Under his guidance as chairman and CEO, more than 1,800 company-owned stores have opened in North America and, since 1996, the company has successfully expanded into Europe and the Pacific Rim, with plans for rigorous growth well into the new millennium. Starbucks also operates a thriving mail order division, a specialty sales division and Starbucks New Venture Company, a wholly owned subsidiary.

Mr. Schultz, a graduate of Northern Michigan University, currently serves on the CARE Corporate Council, as well as on the boards of directors of several privately held emerging growth companies and the National Association of Securities Dealers, Inc.

WHAT MAKES A GLOBAL BRAND TRULY PREEMINENT? IS STARBUCKS THERE YET?

Starbucks' growth and success is a manifestation of our passion — offering the best coffee in the world to our customers and creating for them memorable moments. We did not set out to build a brand, our goal was to build a great company, one that stood for something, one that values the authenticity of its product and the passion of its people.

In this ever-changing society, the most powerful and enduring brands are built from the heart. They are real and sustainable. Their foundations are stronger because they are built with the strength of the human spirit, not an ad campaign. The companies that

STARBUCKS
COFFEE

are lasting are those that are authentic. If people believe they share values with a company, they will stay loyal to a brand.

It's the trust that our people have built with our customers that will allow us to achieve our goal of building an enduring global brand, with products and experiences that are relevant and meaningful to people.

WHAT IS THE RELATIONSHIP BETWEEN YOUR BRAND STRATEGY AND YOUR CORPORATE STRATEGY?

Obviously, there is a strong connection between our brand and our corporate strategies. But they may not always be in synch at a given time. For example, over the last five to ten years, it became financially attractive for us to bring Starbucks coffee to grocery stores across America. Although that was part of our long-term corporate strategy, we felt that the timing was not right because the brand was not mature enough to handle that channel of distribution. This was a classic case in which a business opportunity was not compatible with our strategy of developing the brand. What we did was prepare the company (and the brand) to be able to handle grocery store distribution without diluting the value of our retail sales, which is our core business. Now the brand is ready, and after introducing our coffee in grocery stores in selected markets, we're taking it nationwide.

YOU TOOK A COMMODITY CATEGORY, COFFEE, AND MADE IT INTO ONE OF THE MOST RESPECTED BRANDS AND COMPANIES OF THE LAST DECADE. WHAT ARE THE ESSENTIAL ELEMENTS OF THE STARBUCKS BRAND CHARACTER THAT HAVE LED TO SUCH SUCCESS?

Underlying the growth of Starbucks was the fact that the quality of the coffee being sold to the American public was, for the most part, not very good, and much of it was stale before the customer bought it. In the early days, we were so busy selling coffee, one cup at a time, opening stores and educating people about dark-roasted coffee, that we thought little about "brand strategy."

What we did, was create a company filled with people who have an incredible passion for quality coffee and who share a commitment to making a visit to a Starbucks store a

「世界中どこにいても、スターバックスならくつろげます。」

YOSHI, TOKYO — "When I visit Starbucks, I feel at home anywhere around the globe."

special experience. We buy the best coffee beans in the world and roast them in small batches to capture their full flavor and ensure their freshness. All of our stores are company-owned and we are completely vertically integrated. We control every aspect of coffee buying and roasting.

Seven million people now go through our stores every week and the average customer comes back 18 times a month. Seven percent come back twice a day. I believe Starbucks has the highest frequency rate of any retailer in North America. If you ask our customers why they're coming in, they speak about the Starbucks experience and how that involves the people working in our stores. They recognize that this is not a fast-food experience. They come for the quality of the coffee and the experience. It's the combination of all of these things that enhances the value of the brand.

AS THE COMPANY EXPANDS (ALMOST A STORE A DAY, WITH A GOAL OF 2000 STORES BY THE YEAR 2000), HOW DO YOU CONTROL THE QUALITY OF THE SERVICE AND THEREFORE THE QUALITY OF THE BRAND?

We feel that the relationship we have built with our people — now almost 30,000 — has defined the company and has defined the brand. A guiding principle of the company is to exceed the expectations of our customers, and so our management must first exceed the expectations of our people. It's my job to provide them with better tools with which to do their jobs and make sure that they have trust and confidence in what Starbucks is all about. If we inspire our people, they will inspire our customers. That's how we built the business.

MOST MAJOR BRANDS BUILD AND MAINTAIN THEIR PRESENCE THROUGH ADVERTISING. YOU DID NOT, OPTING INSTEAD TO DO IT "ONE CUSTOMER AT A TIME." HOW HAVE YOU BEEN ABLE TO BUILD SUCH A STRONG, UNIFIED IDENTITY AND IMAGE WITHOUT MASS ADVERTISING?

We, as consumers, are inundated by all kinds of advertising every single day — television, radio, billboards, newspapers and magazines. I've been told that in the '50s, the degree of trust by the viewing public in a 30-second television commercial was 80 percent. And now, it's less than 10 percent. Unlike other major consumer advertisers, Starbucks doesn't have enough money to take the chance on throwing dollars away. So we haven't built our relationship with our customers and our people on 30-second or 60-second sound bites. What we

" Starbucks is a place to collect my thoughts throughout the day."

CAROL, TORONTO

have done, is grow our business the old-fashioned way, as an old-fashioned merchant, one customer at a time.

We've demonstrated to you that the taste and quality of Starbucks coffee is better than anything you've tasted before. That you can rely on it every day, and it's going to be provided to you by people who really care about how that coffee is prepared, and who care about you. We built the brand and the confidence with our customers by demonstrating to them that we are a different kind of company. And I'm pleased to say that the equity of the Starbucks brand is now much greater than the size of the company. We're a billion-dollar company, but the value of the brand is much larger than that.

WHAT ABOUT THE FEELING THAT THE UNITED STATES IS OVER-STORED?

It's absolutely true that America has too many retail stores and not enough customers to support them. I look around and I wonder how all these people are going to survive. I think the challenge is how to differentiate your operation from someone else's and, most importantly, develop a sustainable level of trust and confidence with the consumer. It obviously starts with whether you have a brand and product that gives you a position of difference and leverage with the consumer, based on his or her experience with the company. The equity of the brand is not only the name on the door, but the way the windows are dressed, how the people behind the counter look and the theatrical interpretation of the store design. It's the aroma of the coffee, where the espresso machine is located, and even the vernacular we have created that's now a part of America, whether it's a double tall latte or a dry cappuccino. Retail, more than any other business, is detail. We know that we can't leave things to chance. We have to earn the customer's respect each and every single day. Starbucks has become a "Third Place" all across America, between home and work. It has become a reference point — if you mention a cup of coffee, you mention Starbucks. And we feel that we have a unique advantage over most other consumer brands: we are both a place and a product you consume.

YOU APPEAR TO BE FASTIDIOUSLY SELECTIVE ABOUT LEVERAGING THE STARBUCKS NAME. WHAT IS YOUR PHILOSOPHY IN THIS REGARD?

There are significant opportunities to leverage the equity of the Starbucks brand on all sorts of products and services, but we turn down 99 percent of those things that come our way, even though they would create substantial short-term revenues and profits. We apply a very strict discipline of not abusing the brand, but enhancing it. These are matters that are not in the textbook, but that are in your heart, about what we feel is right for Starbucks to be doing. That's why we resist temptations that sometimes are very seductive and involve millions of dollars, but which we feel are not right for the long-term value of this business. We have to take the long view, because we want to build a great and enduring company and not sacrifice our future for short-term profits.

IN YOUR BOOK, *POUR YOUR HEART INTO IT*, YOU WRITE, "GREAT BRANDS ALWAYS STAND FOR SOMETHING BIGGER THAN THEMSELVES." HOW DO YOU RELATE THAT TO STARBUCKS?

I think about the Starbucks experience as a very emotional one. Coffee is very personal. People are very attached to their coffee. They start their day with it. They read the newspaper with it. They share it with friends. They end a meal with it. Coffee is a very important part of their daily lives. It has also been at the table during many of the great moments of history and literature. We want to be a part of that emotional experience.

WHAT IS THE ROLE OF THE STARBUCKS BRAND ON THE WORLD WIDE WEB?

If you look back at what we've done, our battle cry is that we want to build a great, enduring company. We want to do things that are built to last. We try to get it right the first time. So rather than just throw something on the Web and see if is sticks, we've taken a lot of time to analyze what our message should be and how to differentiate ourselves in launching our Web site. There's no denying that the Web is critical to every consumer franchise that now exists, and we recognize that it will be an integral part of our strategy to build the company and build the brand. And you can be sure of one thing — there will be innovation and differentiation in the way that Starbucks is represented on the Web.

"Hot, cold or just to relax. Starbucks works."

PATRICK, SEATTLE

Building Powerful Strategies that Strengthen Brand Equity

BY KENNETH J. ROBERTS, CHAIRMAN AND CEO

The age of the preeminent world brand is very much upon us, signaling the irrepressible growth of global markets.

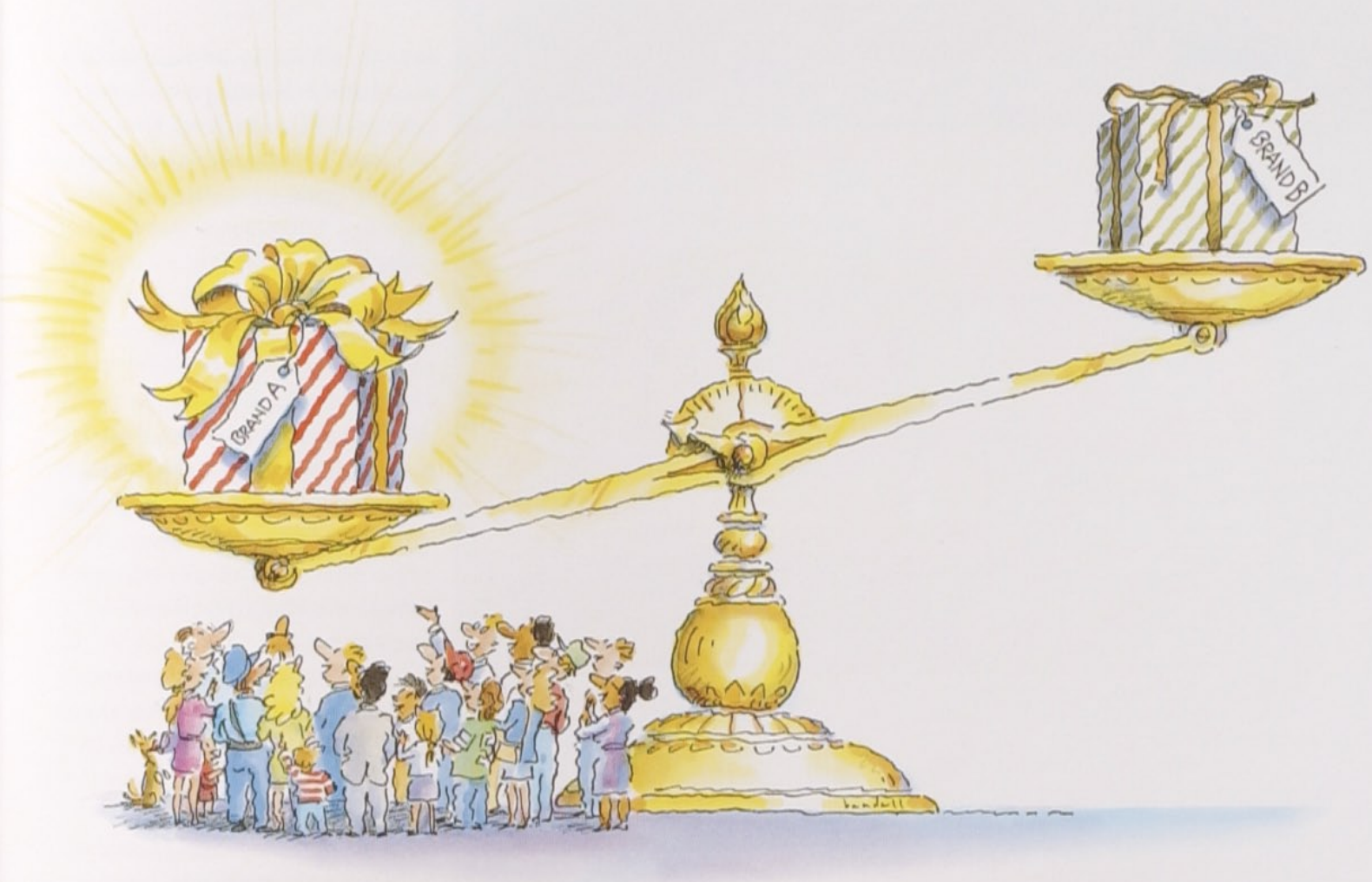
And just as brand dominance sets one company apart from another in local markets, achieving the top position globally is becoming the ultimate competitive weapon for those that aim for global success.

Companies that aspire to having world brands are seeking to take advantage of a singularly under-leveraged asset, and the payoff can be extraordinary. In 1998, globally recognized brands accounted for eight of America's 10 most admired companies according to *Fortune*. The monetary value of Coca-Cola's brand has been estimated at $39 billion — more than twice the company's annual revenues.

But financial rewards are more a motive than an explanation for the sudden mushrooming of dominant global brands. The fact is, technological advances and political and economic trends are combining to create unprecedented opportunities to build world brands. And big companies in industries ranging from financial services, health care and retail, to technology, transportation and energy are looking to capitalize on this new environment. Merrill Lynch, Novartis, McDonald's, Microsoft and Boeing come immediately to mind. At the same time, smaller companies such as GAP, Starbucks and Armani that would once have been content to succeed as domestic brands, are now repositioning themselves as global icons.

What makes a strong brand so powerful?

Simply put, it carries enormous weight in the marketplace, standing for everything about a company and its products that is communicated by the company name and related identifiers. Whether you are Mercedes-Benz, Goldman Sachs or Hoechst, your brand has a direct influence over customers' decisions — it provides buyers with a short cut in processing the information involved in choosing a product or service. Norio Ohga, the chairman of Sony, put it well when he said, "Our biggest asset is four letters: SONY."



Defining the global brand

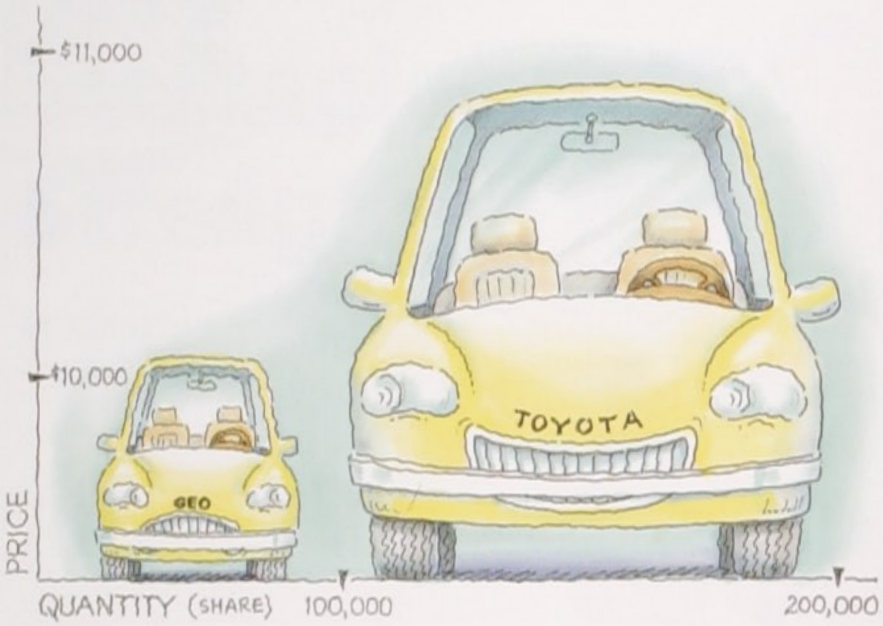
The core issues for any company looking to play the global stage are, how do you get there — and how do you stay in the limelight? Before tackling this subject, let us be specific about what we mean by a global brand. Companies often confuse the strategy of "operating globally" with the concept of global brands. Indeed, says Robert L. Wehling, senior vice president, Advertising/Corporate Affairs & Government Relations for Procter & Gamble, "Assuming adequate levels of capitalization, anyone can accomplish the former; achieving the latter means fashioning a brand that has a clear and consistent equity or identity with consumers across geographies. It is generally positioned the same from one country to another. It has essentially the same product formulation, delivers the same benefits and uses a consistent advertising concept. That isn't to say there isn't room for local tailoring. In fact, there must be room to adapt to local needs."

Taking on the challenges

Building and maintaining a truly global brand is not an easy proposition. There are a lot of smart, knowledgeable people around the world looking to identify the best opportunities to expand flagship products and services, and the competition is getting keener. Bombarded with a confusing array of competing offerings and marketing messages, consumers and business customers will come to rely even more on brands to guide their buying choices.

The flip side of brand potency is that penalties for weak brand management can be very steep, and well-established brands can be undermined — quickly. Remember the recent tribulations of IBM? And what about once hallowed, dominant airlines like Pan Am and TWA? The threats can come just as readily from within as from the marketplace. Think about the fatal damage done to globally ambitious financial organizations like Berings. Consider the growing number of Japanese banks whose global ambitions and image have been tarnished by fiscal improprieties and/or ethical scandals. All it takes to deflate a brand in today's hyper-linked global network is a single misstep.

The challenges extend beyond misguided policies and errant behavior. Global entrepreneurs must also contend with the fundamental reality that consumers tend to prefer domestic brands over foreign brands. Studies



Brand equity is the total value of all qualities and attributes implied by the **brand name** that impact the choices customers make.

show that home-grown brands almost always get preference. In some of the biggest and richest markets — the U.S., Germany and Great Britain among them — the appeal of local brands is especially pronounced.

However large these challenges may loom, they shrink beside the potential rewards of achieving global brand status. Given the mounting importance of branding, it is natural to assume that companies analyze and manage their brands every bit as rigorously as other major corporate assets — like finances, people and technology. That is not generally the case. Relatively few companies demonstrate a clear, consistent commitment to managing their brands.

Obviously, such a commitment is an essential building block for a preeminent global brand. From the most senior management through the ranks, there must be an understanding that brands matter and that building brands is a complicated task requiring ceaseless vigilance, creativity and investment. For some marketing-driven organizations like Microsoft, Procter & Gamble and Disney, this comes naturally. Such organizations set the benchmark for global branding. But there are numerous multinational corporations that are "flag planters" — whose global expansion has been predicated on maintaining decentralized operating units with independent branding objectives. And there are many companies that aspire to global success but lack the marketing disposition necessary to create global brands.

An integrated approach to branding

While there is no single mantra for global branding that can work for everyone, Lippincott & Margulies has developed an approach that is providing different types of companies in different industries a highly effective framework for building powerful brand strategies.

Its foundation rests on an integrated approach to brand management in which an analysis of brand equity is directly linked to the key economic factors of price, market share and brand value. This approach provides information that is extremely beneficial in identifying targeted marketplace actions and strategies to improve brand equity and business performance.

Brand equity is the total value of all qualities and attributes implied by the brand name that impact the choices customers make. It translates into monetary terms a brand's power to convince a customer to buy the company's product. In other words, it represents the brand's ability to actually shift demand from one product to another. Figure 1 shows how higher brand equity can enhance competitiveness by providing significant price and market share advantages.

A compelling example of how a powerful brand can result in big price

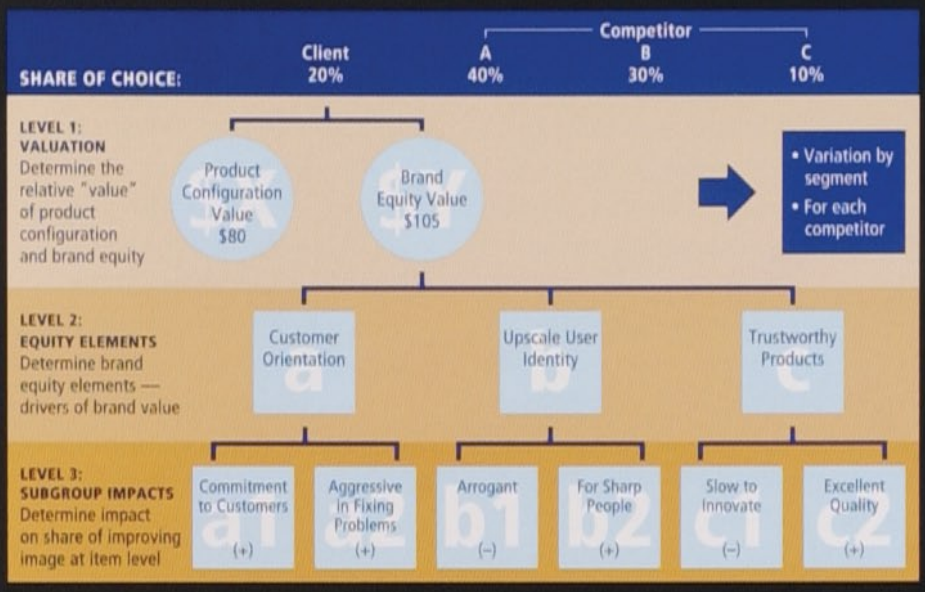
and market share advantages versus a weaker brand is illustrated here by comparing the divergent fortunes of the Toyota Corolla and the Geo Prizm. These cars have been manufactured through a joint venture between General Motors and Toyota since 1989. While the cars are virtually identical, Toyota sold more cars at a higher price between 1990 and 1994. This resulted in $108 million more in operating profits for Toyota, while its dealers made $128 million more than those of GM. Why? Buyers believe a Toyota is superior to a GM car in the same class.

All brands have equity. The equity can be a positive or negative value, depending on whether it makes a customer more or less likely to buy, and the equity can range from strong to weak.

How do brands influence buying decisions? They act as "signals" to customers, conveying, often in a very complex way, what is commonly known as "brand image" information. For example, ABB, a global industrial brand, hypothetically might convey an image of "Swiss engineering," "global performance," "excellent technology," "excellent value," "trustworthiness" and so on.

Identifying brand equity and economic links

Using Strategic Choice Analysis®, a proprietary analytical model, we are able to recreate the decision the consumer makes when choosing among different product design or service options. This methodology clearly identifies the link between brand image perceptions and economic factors such as price and features. The richness of the information that flows



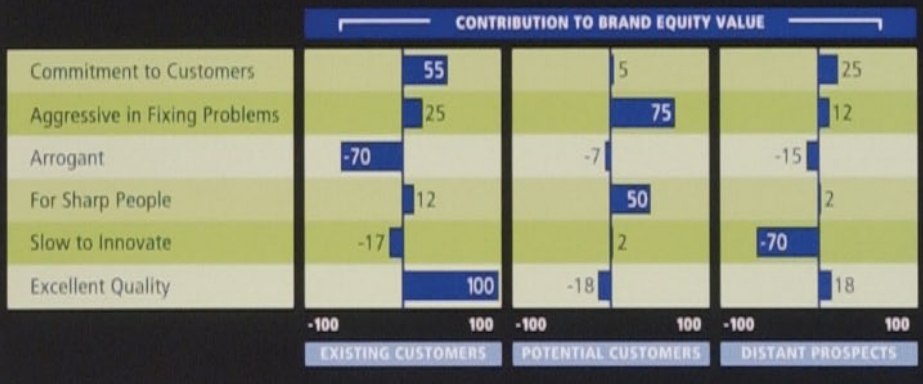
PINNING DOWN BRAND STRATEGY FOR A GLOBAL FINANCIAL INSTITUTION

Figure 1. Here, we have quantified brand equity at three levels, each of which can be a basis for strategy. From the first level of analysis, it is clear that the brand's equity generates more than $100 per customer. In fact, the brand is more valuable than the firm's product configuration, which represents a value of only $80 per customer.

The second level shows that three parts of the firm's image drive brand equity: customer orientation, upscale user identity and trustworthy products. The firm should exploit its positive image in customer orientation and trustworthy products, and fix the negative impact of its upscale user identity.

In level three, specific information is shown about how the firm might exploit and correct its image. For example, its upscale user identity could be made into an asset by eliminating the perception of arrogance.

Figure 2. Here we repeat the brand analysis across each customer segment. Among existing customers, it is clear that the firm's reputation for quality is a significant asset, but that its arrogance is a large detractor. Among potential customers, the firm has a reputation for fixing problems fast and is appealing because of its strong connection with "sharp people." For distant prospects, the firm's perception as a slow innovator is a striking liability. Any attempt to expand the firm's appeal into other segments will have to take this negative perception into account.



from this analysis enables us to quantify a client's brand equity at three levels, each of which can be the basis for recommending actions and strategies:

Valuation — we measure the relative value of brand equity and existing product configurations for our client's company and its competitors. This analysis, typically provided on a segmented basis, permits a high-level view of competitive opportunities and threats, and can immediately be put to work to manage the brand better.

Equity element identification — brand equity is broken into key components that actually determine demand. The analysis reveals positive areas of the brand's image that could be exploited to greater advantage, as well as aspects of the brand that influence demand negatively and need to be addressed.

Subgroup impacts — the diagnosis is taken down to the lowest useful level, describing the specific aspects of the brand's image that come together to form the equity elements. Improvements in each aspect have measurable impacts on market share. This level provides detailed information for use in marketing and promotional initiatives.

Figure 1 gives the results of a typical effort to value and separate brand equity into its constituent elements, in this case for a global financial services firm in one of its major markets. Figure 2 shows the results of repeating this analysis across three customer segments. (See figures and charts in sidebar on previous page.)

Maximizing brand equity

In our experience, describing a brand's value in terms of both its individual image and economic elements unlocks management insight and innovation in a way never before possible. It sheds light on previously unrecognized opportunities and approaches for increasing revenues and building profitability. It permits the development of powerful global strategies for maximizing the value of a firm's brand equity and, in turn, diminishing the equity of its competitors' brands.

Global brand strategies generally reflect four essential goals:

1. **PROTECTING** "core equity elements" — those that are driving market share.
2. **FIXING** negative equity elements — which represent lost share.
3. **ATTACKING** competitors' positive equity elements — that is, neutralizing their brand advantages.
4. **LEVERAGING** competitors' negative equity elements — taking full advantage of their weaknesses.

These strategies need to address each equity element for each competitor and each customer segment. Management can choose from an array of actions to implement the strategies. The particular choice depends on which aspects of a consumer's perception are affected by the equity element in question. Does an equity element, for example, affect the consumer's perception of the product or service offering itself? If so, then the consumer's beliefs should be altered by new product advertising or changes in product design. Is the consumer's choice affected by perceptions of the company? If so, the consumer's view can be influenced through corporate communications and improvements in service and support. Consumers' feelings about themselves and other customers can be managed through image advertising or product repositioning.

The goal is to manipulate each of these levers in a systematic way that maximizes overall brand equity and generates the largest returns.

Brand management as a global competitive weapon

The age of the preeminent world brand is very much upon us, signaling the irrepressible growth of global markets. And just as brand dominance sets one company apart from another in local markets, achieving the top position globally is becoming the ultimate competitive weapon for those that aspire to global success.

Achieving such a lofty position requires an unprecedented commitment from top management and a highly disciplined approach. Management's investment in building brand equity must be as unequivocal as for any other valued corporate asset. The disciplined approach that we have summarized here — integrating the analysis of a brand's image with economic measures — generates the information and allows the analysis that results in informed, effective decision making. The payoff can be a significant edge for companies aspiring to leadership in the age of the preeminent global brand.

This article was written with editorial and research support from Dr. Eric Almquist and Ian Turvill. Dr. Almquist is a Director and Vice President of Mercer Management Consulting and a Vice President in the firm's Strategic Capabilities Group. He specializes in marketing strategy, new product development and the management of customers as assets. Ian Turvill, an Associate in the Chicago office of Mercer Management Consulting, was named the George Hay Brown Marketing Scholar of the Year in 1997, recognizing him as the top MBA student in the U.S. with a concentration in Marketing.

Glossary of Identity Terms

When the founders of Lippincott & Margulies originated the concept of "corporate identity", the term denoted the most fundamental ways that a company projects its individuality. Over time, the firm has developed sophisticated new methodologies and tools for building and managing distinctive corporate, retail and brand identities. With it has grown a vocabulary of industry terms, honed and refined through client assignments, highlights of which are collected in this glossary for reference.

Brand Equity — The power of a brand – through successful creation of a positive image – to shift demand and change customer behavior.

Brand Identity — The visible elements that can be used to identify a brand (name, logotype, symbol, product configuration, service offering and packaging).

Brand Image — The complete bundle of thoughts a customer has in his or her mind about a company, product or service developed through communications and experience, including the distinguishing "human" characteristics of a brand personality (e.g., warm and friendly, strong and reliable).

Brand Promise — A statement of the enduring, relevant and distinctive benefits customers associate with a product, service or company.

Brand Strategy — Long-term plan for the brand including a determination of key audiences and an understanding of what those audiences need to know about the brand and experience.

Communications Audit — A formal examination of an organization's visual and verbal communications practices.

Communications Plan — A company's communications goals and objectives, and the messages and vehicles that will be used to meet them.

Corporate Identity — The visible elements (name, logotypes, symbols, signs, offices, factories, advertising, trucks, packaging, letterhead, business cards, etc.) which can be used to identify a company.

Corporate Image — The perception that people have of a company, based on a combination of various communications and personal experience.

Corporate Mission — Defines why the organization exists, its core values and intent, and serves to unite organizational behavior.

Culture and Style — Distinctive attributes and competitive advantages relating to organizational beliefs, values and traits; how the organization behaves as it uniquely goes about its business.

Image Attributes — Help define the tone, manner, personality and style of a brand, often the differentiating factor between similar products and services.

Image Criteria — The desired "personality" attributes of a company, product or service that guide name and design development.

Logotype — A unique group of letterforms that represent the corporate brand. IBM, NUVEEN and GAP feature logotypes as their primary form of identity.

Message — The information (facts, strengths, culture/style and future direction) that is most relevant to priority audiences and serve as major content points for all communications.

Name Direction — Creative concepts and approaches that guide name generation.

Name Generation — Creative development of a comprehensive yet focused list of names that address specific image and functional criteria.

Naming — The strategic and creative discipline of developing the most appropriate word or words to identify an organization, product or service.

Nomenclature System — Method for associating divisions, subsidiaries, brands, etc. with the parent company.

Positioning Statement — Provides the underlying platform for communications, reflecting the company's/brand's value proposition. Address: 1) definition – how the company defines its business or how the brand defines its competitive set; who we are and what we do; 2) differentiation – what makes the company/brand special; how we do it; and 3) deliverables – benefit delivered to its customers.

Symbol — A non-typographic element of an abstract or representational nature. Texaco, Apple and Continental Airlines feature graphic symbols as an important form of their identity.

Visual Communications System — A planned method of identification including the use of a company's name, logotype, color palette and secondary typography; a company's graphic "look and feel," applied to a wide cross-section of media to create a cohesive brand presence.

The Real Global Thing!

"...all over the world, **COCA-COLA** has become a contributor to special times in people's lives."

M. DOUGLAS IVESTER, CHAIRMAN AND CHIEF EXECUTIVE OFFICER, THE COCA-COLA COMPANY

In 1997, M. Douglas Ivester became the 10th chairman and chief executive officer in the 112-year history of The Coca-Cola Company. Mr. Ivester has been an architect of significant change for the Company, from dramatic shifts in financial policies to the creation of the anchor bottler network. In 1998, the Company reached the milestone of selling a billion servings of its products every day.

Mr. Ivester recognizes that vast opportunity is still available.

"We're already working on our next billion servings per day...and we don't expect to take 112 years to get there," he stated in the Company's 1997 Annual Report.

A graduate of the University of Georgia, Mr. Ivester joined the Company in 1979. Throughout the early 1980s, he moved through the financial ranks. In 1989, he took on operating responsibility as president of the Company's European Community Group, followed by roles as president of Coca-Cola USA and the North American Business Sector.

Innovations under Mr. Ivester's leadership include the initial public offering that created Coca-Cola Enterprises, entrance into East Germany after the fall of the Berlin Wall, the introduction of the 20-ounce plastic bottle for Coca-Cola and the strengthening of the Company's bottling network.

Mr. Ivester is a member of the Board of Directors of Georgia-Pacific Corporation, the Grocery Manufacturers of America and SunTrust Banks Inc. He is also a member of the Board of Trustees of Morehouse College and Brenau University, and is a former managing trustee of the University of Georgia Foundation.

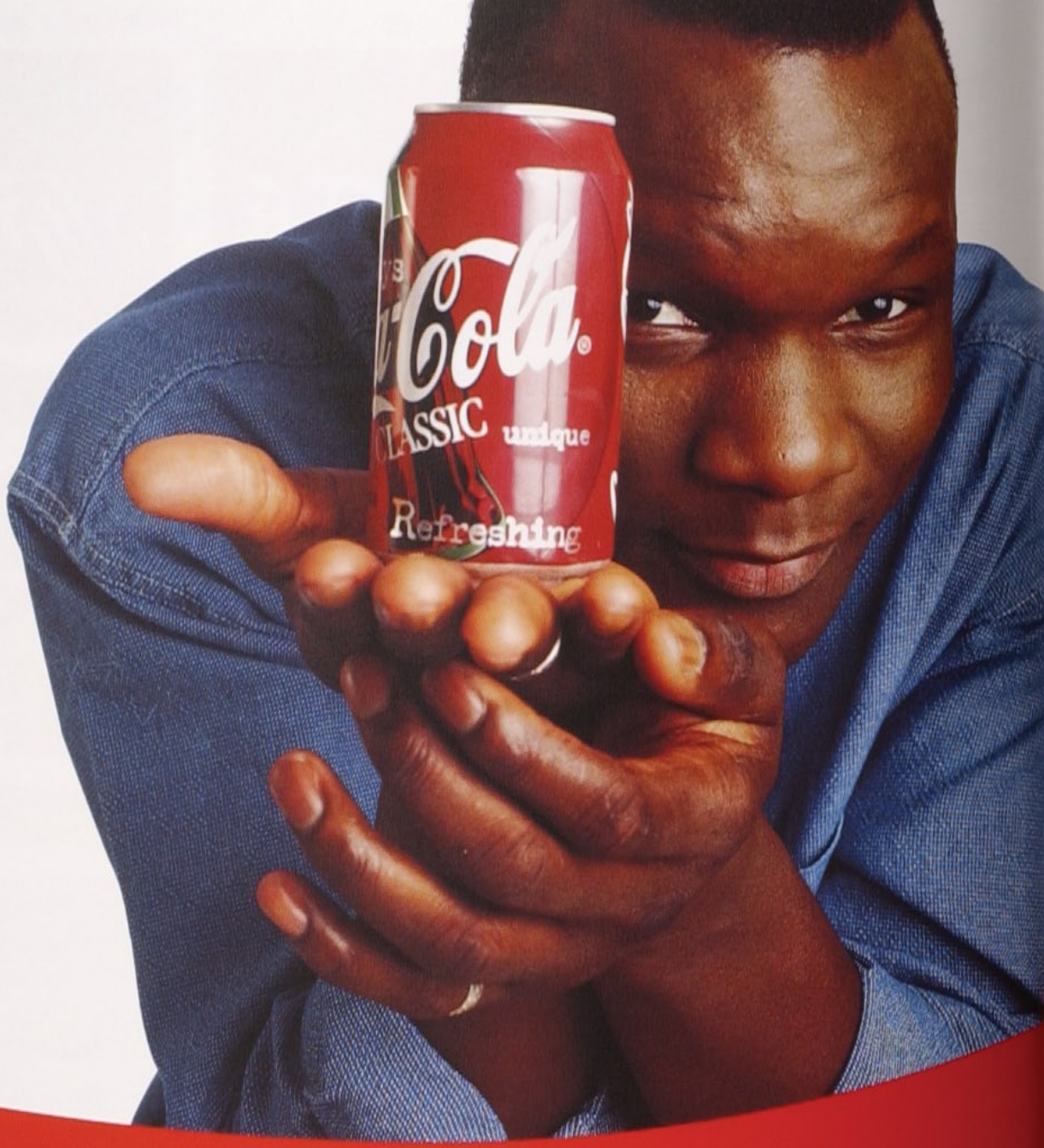
BY ANY MEASURE, COCA-COLA IS A GREAT GLOBAL BRAND. WHAT ATTRIBUTES ACCOUNT FOR THIS STATUS AND FOR THE INTENSE LOYALTY OF COCA-COLA DRINKERS?
From its inception more than 100 years ago, Coca-Cola has been positioned to contribute to fun times, to making life a little better, a little lighter, a little more enjoyable. And part of the brilliance of that original strategy was to position Coke as more than a soft drink.

For example, a friend of mine, a retired college professor who has worked all over the world, likes to tell the story of how Coca-Cola helped him meet his wife. He saw this pretty lady he wanted to meet, so he bought two Cokes and took one over to her. And that became the defining moment of his life up to then.

I think almost everybody can remember when they had their first Coke. Not just people in the United States, but people in Tanzania, Nigeria, Beijing, in Tokyo, all over the world. Coca-Cola has become a contributor to special times in people's lives.

YOU SAY ALL OVER THE WORLD, BUT THE COCA-COLA BRAND NAME IS SO INTRINSICALLY AMERICAN. WHAT ARE THE POSITIVE RESULTS, AS WELL AS THE NEGATIVE REPERCUSSIONS OF SELLING A UNIQUELY AMERICAN IDENTITY ON THE GLOBAL STAGE?
What's interesting about your question is that it's from an American point of view. In other places around the world, Coca-Cola is just a part of daily life. Not only do you drink it, but it may be how you make a living. I have an acquaintance in Kenya who started out selling Coca-Cola on a street corner. She went from a small hand-held cooler to a bigger cooler, to a kiosk, to a kiosk with a refrigerator. When I saw her the last time, I gave her a TV set, so now she's sort of a sports bar. She sent me a message not long ago telling me that she had bought her first used car. So Coca-Cola is really part of her life. She doesn't see it as American. It's part of her life in Kenya.

What we have been able to do is capitalize on the heritage that Coca-Cola has had in America in a very special and unique way. One other example is Santa Claus. When our forefather, Mr. Woodruff, hired Haddon Sundblom to portray Santa Claus in Coca-Cola print ads, he created the characterization of Santa Claus that everybody in America recognizes today. So Coca-Cola has become part of Christmas in a very unique way. That means we've been



able to capitalize on our heritage, but at the same time do so without making it so American that it turns anybody off elsewhere in the world.

EIGHTY PERCENT OF COCA-COLA'S PROFITS COME FROM OVERSEAS. HOW MUCH ARE CULTURAL DIFFERENCES TAKEN INTO ACCOUNT IN YOUR MARKETING EFFORTS? DO YOU PROJECT AN AMERICAN IDENTITY OR DO YOU IMMERSE THE COCA-COLA BRAND IN LANGUAGE AND IMAGERY UNIQUE TO THE LOCALITY WHERE YOU'RE DOING BUSINESS?

We do have a global brand position, which concentrates on making Coke part of good times and more than a soft drink. But we do allow our people, through consumer research, to tailor those local images so that Coca-Cola becomes part of the fabric of a particular society. For example, you know those little Russian dolls that go inside one another? Well, we have little Coke bottles that do the same thing. It's very uniquely Russian, but it was used in a promotion that made Coca-Cola part of that society as well. We also did a five-part series of commercials based on an ancient Russian fable called "The Firebird and the Gray Wolf." The tag line at the end of each commercial says, "Coca-Cola: Drink the Legend." As a result, we were able to associate Coke with this ancient folk tale, and do it in a very modern way so that people could relate to it and feel that Coca-Cola is really authentic in Russian terms. We can do the same in China, in Japan, in Minneapolis and in Vancouver. Coca-Cola is a brand that allows us to tailor it to the fabric of everybody's daily life.

"Rien ne me rafraîchit autant que Coca-Cola après l'entraînement."

ABDOULAYE, DAKAR — "Coca-Cola cools me down after training when nothing else will."

WHAT IS COCA-COLA'S GLOBAL BRAND STRATEGY, AND IS IT INTRINSICALLY TIED TO THE COMPANY'S CORPORATE STRATEGY?
Our corporate strategy is based on opportunity. We know we're in the beverage business. We sell one billion Cokes a day, but we know that people drink 48 billion servings of beverages every day around the world. So in terms of global opportunity we have only a two share of the beverage business. Therefore, we design a business system and a strategy to take advantage of that opportunity. Coca-Cola is the cornerstone of that strategy, because it is the brand that has instant recognition worldwide and allows us to build critical mass from day one. Then you can hang on to local products, if you have them, or to other international brands that would be relevant to consumers.

We want to capitalize on the brand. A brand, after all, is a promise to the consumer. When people around the globe are asked what they think of Coca-Cola the brand, they will tell you that they can always trust Coca-Cola. That's because they know we will live up to the quality standards we promise. So the brand makes certain promises. It promises quality. It promises value. And it promises propriety in the local context.

In economic terms, we also promise jobs, favorable economics, proper retailer margins, and we promise that people can make a living selling Coca-Cola. So there's both the brand promise and the business promise. There are very few companies whose main consumer and brand composition is in fact their company name. Procter & Gamble is a very successful company, but nobody knows what a Procter is or a Gamble is. But the intrinsic connection of our name with our main product in effect blends the promise we make to the consumer with the promise we make on the corporate level as well.

HOW DO YOU RELATE THAT TO A PRODUCT WITH ANOTHER NAME, SUCH AS SPRITE?
Sprite is an important product that delivers its own brand promise. But that's not connected to the corporate promise. For example, we don't have any Sprite bottling companies around the world. We don't have a Sprite de Mexico, but we do have a Coca-Cola de Mexico. Our additional products are tailored to specific consumer populations. Sprite is certainly one. Fanta is another. If Fanta were a separate company, it would be the third or fourth largest beverage company in the world. But nobody thinks of the Fanta Bottling Co. It's the Coca-Cola Bottling Co.

Coca-Cola
CLASSIC

"I love the way the Coca-Cola bottle fits in my hand."

BRIDGET, NEW YORK

HOW DO YOU PROTECT THE BRAND FROM DILUTION AND DAMAGE, PARTICULARLY SINCE COCA-COLA'S PRESENCE IS SO FAR-FLUNG?

From a marketing perspective, we're very, very careful about what Coca-Cola does and what it doesn't do. For example, somebody offered me the opportunity to put the Coke name on the mat on which a boxing match takes place. I turned it down. It wasn't for us. We also have a very strong legal environment that's very protective of our brand from the legal perspective as well. Most importantly, the responsibility for the stewardship of the brand comes straight up to my desk. It's not something that we delegate lightly.

DO YOU HAVE ANY PROBLEMS IN THAT REGARD INTERNATIONALLY?

Not a lot. We're fortunate in that regard because the economics of the soft drink business are driven by scale. A soft drink plant in the Ukraine today may cost 50 to 60 million dollars. You must have a lot of volume in order to operate economically when you build a plant of that magnitude. So it's not subject to knockoffs the way something that has a lower cost of entry might be.

WHAT ELEMENT OF THE COCA-COLA BRAND — THE FORMULA, THE LOGO, THE CONTOUR BOTTLE, THE IMAGE ADVERTISING — IS THE MOST IMPORTANT COMPONENT OF THE BRAND'S IDENTITY?

One thing you should add to that list is quality, because that is an important part of the fabric of the brand as well. We have a saying here, "Everything counts and everything communicates." So I don't think you can separate any of those components. We constantly try to polish and protect each one of them. But the truth is, everything does communicate, everything we do, everything we don't do, everything we say, everything we don't say. And we follow that philosophy with regard to all of those elements.

HOW ABOUT THE CONTOUR BOTTLE? HOW DOES THAT BUILD AWARENESS OF THE COCA-COLA BRAND?

The contour bottle is one of those unique things that symbolize only Coca-Cola. Going back to the original concept, when they had a contest to design the bottle, one of the requirements was that people would have to recognize that it was Coke even in the dark. So you get not only the look you want with this bottle, but you also get the feel. That allows us to have lines like "The feel of refreshment," which has a double or triple meaning. We call it "contourizing" a market when we go into the marketplace. Several years ago, we put on the cover of our annual report the silhouette of a contour bottle and

A new Coca-Cola ad campaign, developed specifically for Russia, urges consumers to "Drink the Legend." This campaign used images from the "Firebird" legend and was also filmed on location in the Moscow subway and in other locations throughout Russia and Siberia.

didn't put the name of our company on it. One of our stockholders wrote to tell me that his four-year-old daughter looked at it and said, "That's a Coca-Cola book." So the bottle gives us instant recognition, and it's backed up by the promises we make.

HOW IMPORTANT IS IT FOR YOUR EMPLOYEES TO TAKE PERSONAL RESPONSIBILITY FOR REPRESENTING AND PROMOTING THE COCA-COLA BRAND — IN THEIR RELATIONS WITH EACH OTHER AND WITH THE PUBLIC AT LARGE?

I tell all our employees up and down the line that they are the face of the brand. When they smile, Coca-Cola smiles. When they frown, Coca-Cola frowns. And we're constantly reinforcing with each of our employees that they are important to what takes place with the brand, as well as to the image of the company. We try to put the weight of the company and the weight of the trademark on each of our employees. We tell them that when Coca-Cola is put on their business cards, they have a greater duty and higher responsibility than if they carried some other trademark on their cards.

"Coca-Cola es la marca que me gusta mas."

JOHANNA, PUERTO RICO — "Coca-Cola is, like, *my* brand."

YOU'VE SAID THAT YOU PREFER THAT YOUR EMPLOYEES THINK OF THEMSELVES AS KNOWLEDGE WORKERS, THAT THEIR OFFICE IS THE INFORMATION THEY CARRY AROUND WITH THEM, SUPPORTED BY TECHNOLOGY THAT ALLOWS THEM TO WORK ANYWHERE. WHAT EFFECT DOES THIS PHILOSOPHY HAVE ON THE COMPANY GLOBALLY, AND ON HOW THE BRAND IS PERCEIVED?

The result of this thinking is that we have a far more efficient workforce, people who believe they can be effective anyplace they are, with technology systems that are designed to give them the tools they need wherever they are working. So if they're at home, in the workplace, traveling, in a hotel room or in a customer's office somewhere in the world, they're equipped to be as efficient as possible. I think that if we give them the tools and equipment, it gives them the confidence to go out and do a good job. As much as anything, the confidence factor they have in representing the company is one of our key assets.

HOW MUCH STOCK DO YOU PUT IN THE IMPORTANCE AND EFFECTIVENESS OF ADVERTISING, PUBLIC RELATIONS, CAUSE MARKETING AND CELEBRITY ENDORSEMENTS?

They're elements. At the World Economic Forum in Davos, Switzerland, earlier this year we had a snow sculpture of a ten-foot-high Coke bottle. It was relevant, it was topical, and it attracted a great deal of attention and coverage. Every TV news crew went to shoot there, or they wanted their newscasts there. We do many other relevant things. We're building schools in China, for example. It's called "Project Hope" and we're building 300 schools in rural areas. It's relevant to the government and it's appropriate to us. These children will have a positive experience with Coca-Cola. They may not buy a Coke themselves until they're 21, but they'll have a memory of Coca-Cola doing something good for them when they were children.

HOW DO YOU MANAGE A PRESENCE IN COUNTRIES UNDERGOING POLITICAL FLUX, SUCH AS CHINA?

The great thing about our business is something we call the multiplier effect. Our business creates jobs. Every person we employ in a particular country creates seven to ten other jobs there. We've doubled our employment in France in the last ten years. We have more than 2,000 employees in France, so we're responsible for 14,000 to 15,000 more jobs there. So the government sees us as very desirable in terms of our contribution. They also know what we do on the community level, from building schools to supporting the opera or the symphony or whatever the relevant local event may be. So we think we can make it through political turmoil better than most other companies.

Brand Building in a Growth Market

The Latin American marketplace — **470 million consumers strong** and evolving at an unprecedented pace — offers vast business opportunity.

Once the fragmented and closely guarded bailiwick of entrenched interests, Latin America is rapidly transforming itself into a unified open market. But as the market evolves, so do the challenges. Old ways of doing business must be jettisoned as savvy global competitors flock to take advantage of the enormous potential for profits.

Among the most daunting challenges is identity and image management. Under the old regime, international borders, trade barriers, limited technology and government regulations protected companies from going head-to-head with regional and global competitors. Markets were narrowly defined, and consumer choices were narrowly circumscribed. In this limited environment there was little need to communicate a consumer-oriented image.

Barriers Fall and Competitors Rush In

Today, all that has changed. As trade barriers fall, both Latin American and global multinationals are targeting markets where reduced inflation and a growing middle class have created enormous profit potential. Moreover, many regional and local companies — now managed by entrepreneurial foreign-trained executives — are beginning to grasp the marketing demands of this shifting competitive landscape. And they, too, recognize the need for more sophisticated identity and image programs that enable them to speak to consumers, potential employees and the investment community with a cohesive message that addresses cultural differences across regional and international boundaries.

Supporting Growth with Brand-Building Know-How

In this environment, Lippincott & Margulies is providing the experience and expertise that have advanced the interests of some of the world's best-known companies. Latin American companies are supported by the firm's expanded presence in Mexico, Brazil, Argentina, Chile, Peru, Colombia and Venezuela, providing clients brand image and identity consultation services that ensure a cohesive, unified image in support of growth initiatives.

On these pages we provide some brief highlights of our ongoing work on behalf of Latin American and global companies vying for a competitive advantage in this dynamic business arena.

Since its privatization in 1990, **Telmex**, Mexico's largest telecommunications company, has faced multiple challenges. Lippincott & Margulies partnered with Telmex to define a coherent brand architecture and establish a clear positioning that reinforces the company's desired image attributes. Our work has helped Telmex communicate its unparalleled client service orientation and differentiate itself as a market leader.

Mexico's largest corporation, state-owned **Pemex** long enjoyed a monopoly with its natural gas division, Pemex Gas and Basic Petrochemicals. Through the creation of a new visual identity and communications strategy, our work is focused on positioning Pemex in the newly deregulated natural gas marketplace as a dynamic, customer-focused enterprise committed to meeting domestic expectations, as well as the challenges of international competition.

When **Citibank** acquired state-owned **Confia**, Mexico's 11th largest bank, it planned to use Confia's network of nearly 300 branch offices to expand its own presence in Mexico. Confia's image, however, had been clouded by unfavorable publicity, complicating Citibank's use of the Confia name going forward. A brand identity strategy for the Confia acquisition — and subsequent Citibank acquisitions — works to extend Citibank's image as a prestigious international financial service leader in the Latin American market.

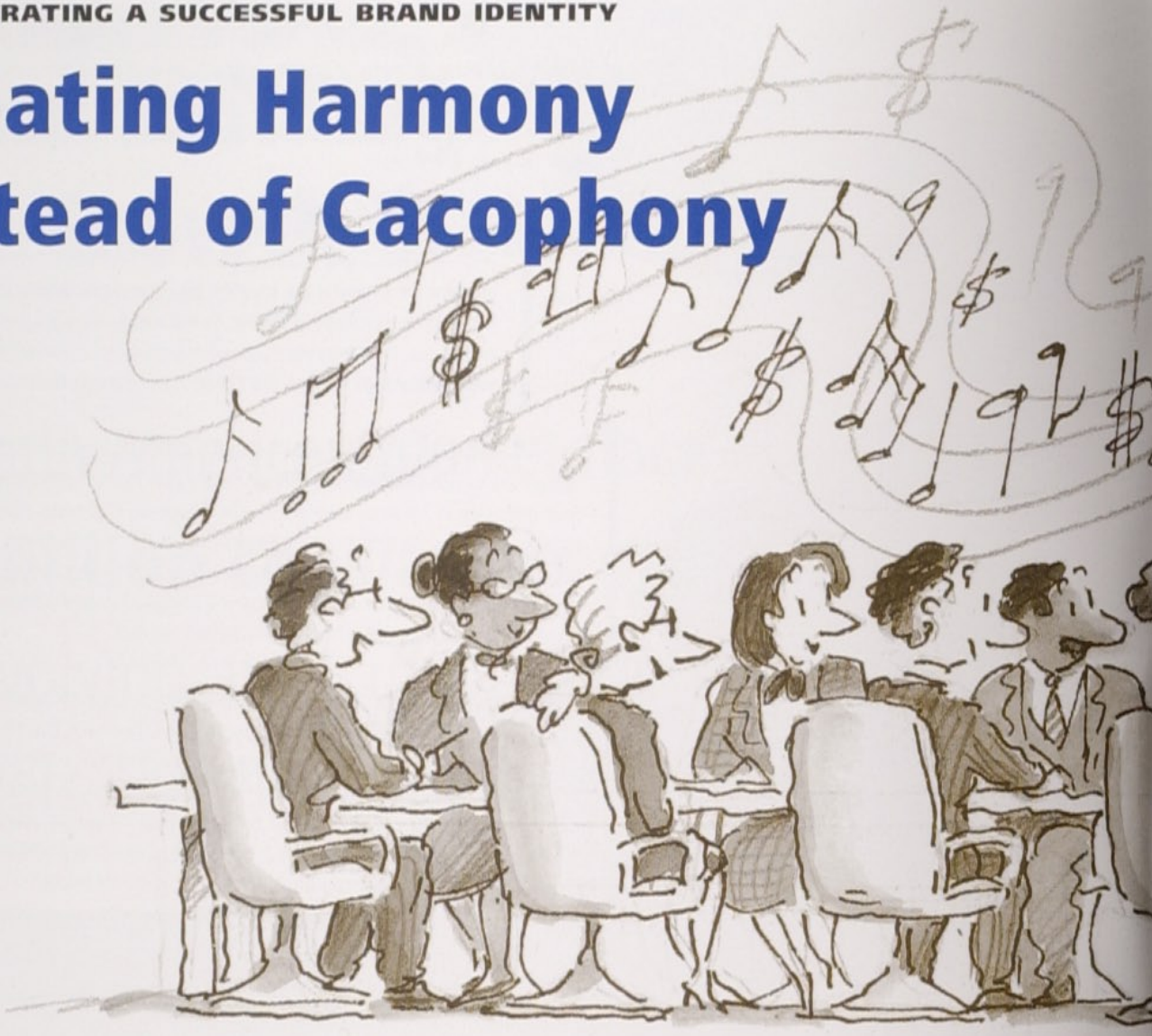
When **Continental Airlines** acquired 49 percent of **Copa**, the national airline of Panama, the company was faced with the challenge of defining and communicating a new identity that would strike the proper balance between key characteristics of both brands. By keeping in mind the objectives of the Latin American market as well as each airline's principal identifying elements, the final result is an identity that reflects Copa's regional personality and Continental's international focus in equal measure.

The dominant broadcast brand in Brazil, **Rede Globo** produces and owns most of its programming rights, and enjoys a primetime market share of nearly 70 percent. Through our brand assessment consulting work, we are providing identity and communications strategies to support Rede Globo in leveraging the equity of its valuable brand into highly profitable brand extension and licensing opportunities.

D&S Supermarkets is the largest operator of supermarkets in Chile, with an estimated 20 percent market share, over 100 stores and three distinctly branded, demographically targeted store formats. With a strengthened economy, D&S is capitalizing on the rising purchasing power of Chile's middle and lower middle classes by repositioning one of its store brands to communicate an enhanced image based on a new "fresh and clean" look.

Banco Sud Americano, like other privately owned institutions in Chile, faced serious challenges as a lessening of restrictive taxation and regulation allowed foreign competitors to move aggressively into its traditionally protected markets. For Banco Sud Americano, a new consumer-oriented positioning platform aimed at projecting an image of professionalism, personal attention and international competency has contributed to a significant improvement in the bank's performance and perception in the investment community.

Creating Harmony Instead of Cacophony



Managing a brand identity is somewhat akin to conducting a symphony orchestra. The audience's expectations of quality and selection must be clearly understood. Gifted musicians, trained to excel as individuals, need to perform as a team, executing their parts flawlessly under the watchful direction of a skilled conductor. While behind the scenes, scores of support personnel — sound technicians, lighting directors, stage managers and others — provide ambient and technical assistance. Artfully crafted and expertly rehearsed, the performance should culminate in thunderous applause — or, in the case of a brand, bullish marketplace enthusiasm.

Like running an orchestra well, managing a brand requires discipline, practice and performance. Whether your company's brand is focused nationally or operates globally, a memorable brand presentation is always desirable. Keeping these few rules top-of-mind will help protect you from a cacophonous market experience.

Since a company's brand identity should be a reflection of corporate strategy and culture:

- **Confirm buy-in from senior management that they will function as the brand's "conductor," providing leadership, setting direction and nurturing development.**
- **Create a small interdisciplinary task force accountable for managing the brand identity.**
- **Clarify, identify and concentrate on the most important audiences — those on which your brand will make the strongest impression.**
- **Set realistic project budgets based on a detailed audit of existing materials, target audiences,**

marketing, public relations and advertising requirements, and anticipated implementation support.

- **Determine a pragmatic timetable,** including adequate time for decision making, management endorsement and a smooth rollout process.
- **Develop a clear brand identity strategy,** communications plan and comprehensive design system.
- **Build internal interest** and excitement throughout the process by communicating the relationship of the brand identity to your business, offering periodic progress reports and demonstrating tangible benefits.
- **Provide guidelines and standards** to clearly and succinctly illustrate the tone, manner and look of the brand identity.
- **Invest in companywide training** (practice sessions) to ensure that everyone supports the idea of a cohesive brand identity and is equipped to execute their part appropriately.
- **Finally,** because brand management can be time-consuming and involve hundreds of minute details, **consider hiring an expert** to help ensure that the "score" you arrange for your company results in a standing ovation.

We Can Do That!

"I think **SIEMENS**' basic principles are so universal that they can be readily transmitted and embraced at any location."

DR. HEINRICH von PIERER, PRESIDENT AND CHIEF EXECUTIVE OFFICER, SIEMENS AG

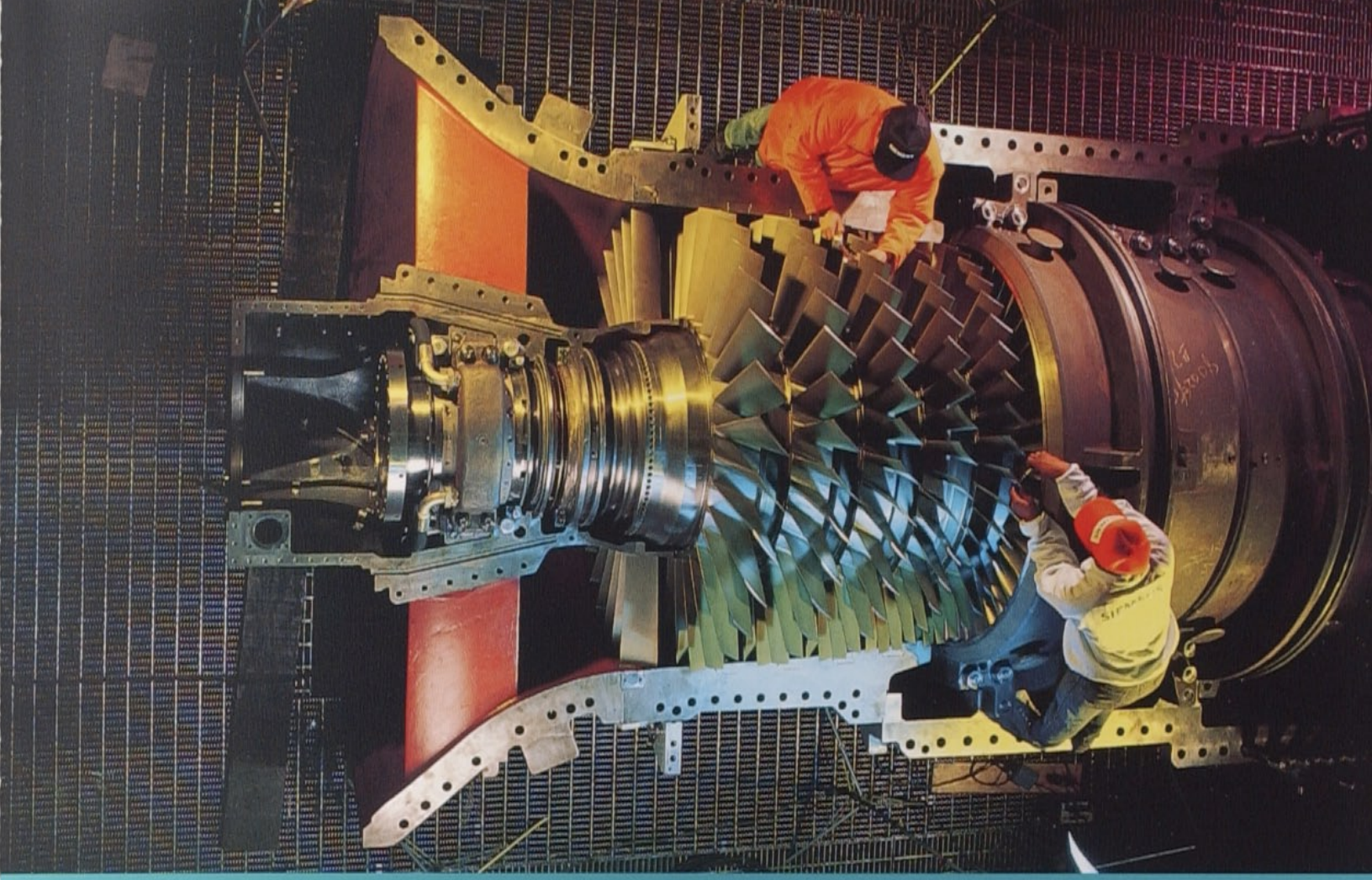
Siemens AG powers the world — and as president and chief executive officer since 1992, Dr. Heinrich von Pierer has been a powerful force behind the company's global ascendancy.

Deeply committed to the integrity of the Siemens brand, Dr. Pierer has served as the catalyst for Siemens' *Top* program, which focuses on streamlining the company's internal processes, emphasizing continuous innovation, entering vital new markets and fortifying corporate culture. Under his direction, Siemens has anchored its presence in Eastern Europe and is rapidly building its position in the dynamic North American and Asian markets.

Dr. Pierer has characterized Siemens as "increasingly evolving into an innovative, global network." In his letter to shareholders in the company's 1997 annual report, Dr. Pierer stated that Siemens is "a network of people committed to using their electrical engineering and electronics knowledge to benefit customers around the world."

A native of Erlangen, Germany, Dr. Pierer earned both a doctorate of law in 1968 and a degree in economics in 1969 from the Friederich Alexander University of Erlangen/Nuremberg. Prior to ascending to the company's top post, he headed up Kraftwerk Union AG (KWU) and the Power Generation Group, two Siemens operating groups in the energy segment.

Dr. Pierer is Chairman of the Asia-Pacific Committee of German Business and is a member of Technologierat, former German Chancellor Helmut Kohl's advisory committee on technology.



YOUR COMPANY CELEBRATED ITS 150TH ANNIVERSARY LAST YEAR. WHEN DID YOU FIRST IMPLEMENT A GLOBALIZATION STRATEGY AND HOW DID THAT STRATEGY TAKE SHAPE?

When Siemens was established in Berlin in 1847, our founder Werner von Siemens moved quickly to fulfill his vision of building a worldwide enterprise. Only five years later we were installing Russia's first telegraph network, and in 1855 we opened a subsidiary in St. Petersburg. By the 1870s, the company had set up so many foreign manufacturing companies and was exporting so extensively that it was truly international in scope. In 1890, nearly half of the 4,500 Siemens employees worked outside Germany. So you can really say our globalization strategy was born with the company and has been pursued and refined ever since. In the '50s and '60s, for example, we focused on rebuilding our position in Europe and South America. In the '70s and '80s, we turned our attention to the United States, and in the '90s we pushed into Asian markets with renewed vigor. Today we have operations in more than 190 countries and over half of our 400,000 employees work outside Germany.

CORPORATE LONGEVITY DEMANDS THAT A COMPANY BE CAPABLE OF LEARNING AND CHANGING AND YET STILL MAINTAIN CONTINUITY. HOW DOES SIEMENS MAINTAIN THAT BALANCE?

As one of the world's oldest industrial companies, Siemens is a paragon of corporate longevity. Our survival alone proves we can learn and adapt to constantly changing market conditions without losing sight of our identity. All these years we have perpetuated the core values defined by our founder Werner von Siemens. I'd say that these values — being sensitive to change and responding to it, giving our people a strong sense of community, welcoming new ideas and experimentation, and maintaining a strong financial base to keep our independence — have been the backbone of our corporate culture. They have helped us survive enormous adversities, expand our operations around the globe, and remain a leading mover and shaper of our industry for generation after generation. At the same time, these values both allow and encourage us to adapt our culture periodically, as we are doing right now to master the challenges of market deregulation, liberalization and globalization. Put simply: our culture guarantees the balance between continuity and change.

"कंपनी जो दुनिया को सचमुच सक्रिय बनाती है."

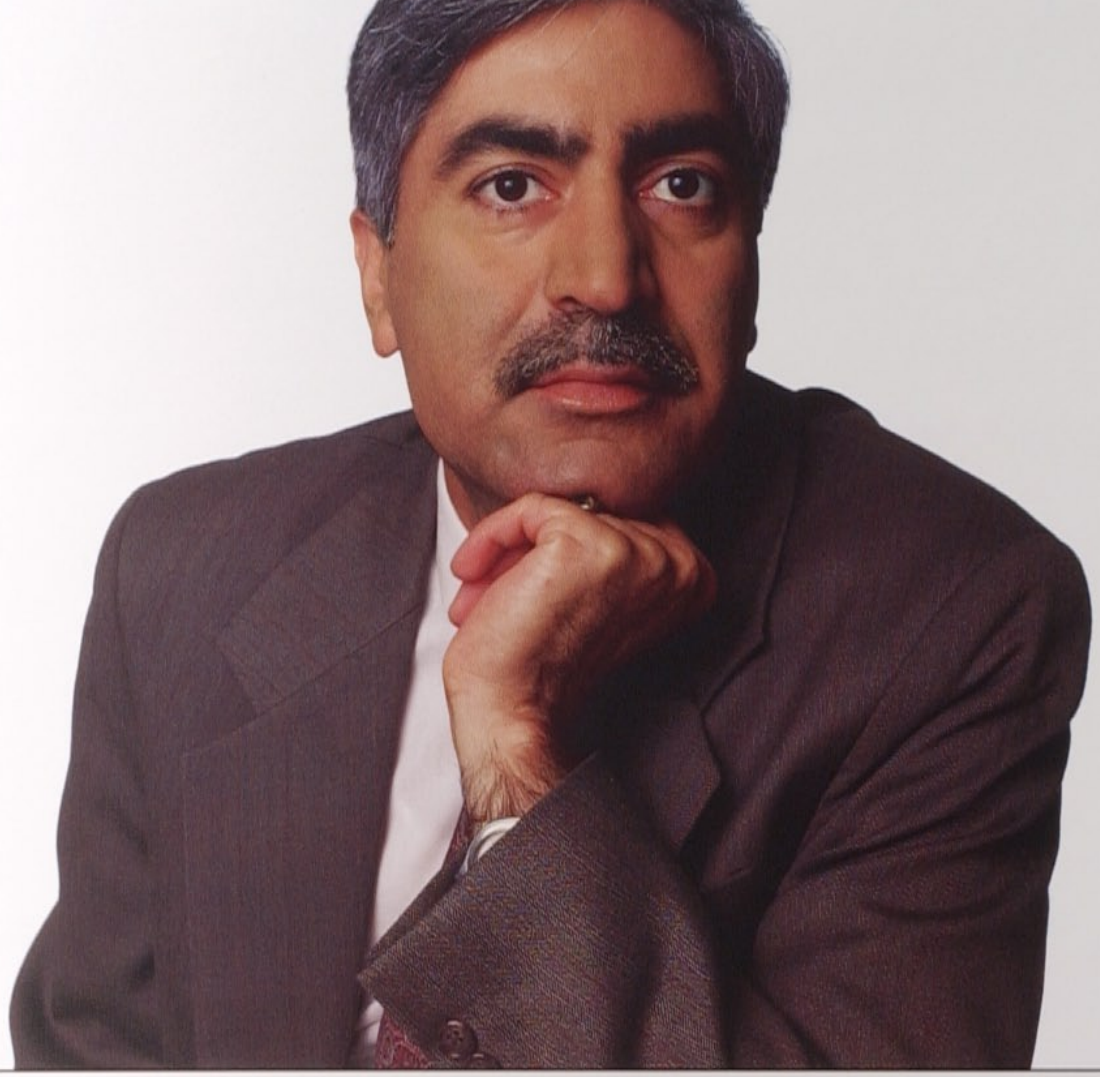
RANDY, CALCUTTA — "It's the company that literally makes the world work."

HOW WOULD YOU DEFINE WHAT YOU CALL YOUR "BALANCED, GLOBAL VALUE-ADDED NETWORK"?

Today, exports alone are not enough to secure competitive market shares. To remain viable, one must move into growth markets, form local partnerships with firms and customers, build plants, buy from local suppliers, provide vocational and managerial training, draw on local know-how, establish centers of competence — and integrate all of this into a global network. Such a network is the only way to achieve a sustainable competitive mix of optimized cost, quality, speed, pricing and flexibility. Our balanced network ensures that the Siemens name is a guarantee for innovative, high-quality, dependable and market-tailored products, systems and services — wherever they originate and wherever they are sold.

IS THERE A CONSCIOUS EFFORT TO PROJECT A UNIFIED CORPORATE BRAND IMAGE ACROSS ALL OF SIEMENS' BUSINESSES? IF SO, HOW DO YOU DO IT?

All eight of our core businesses — energy, industry, information and communications, transportation, health care, components and lighting — are in the fields of electrical engineering and electronics. This focus not only gives us unique strength in the industry, but offers valuable cross-business synergies, making us greater than the sum of our parts. We are a solutions business, providing everything from power plants and telephone networks to metro systems and hospital services from one source. The name Siemens is in itself a core attribute, a unifying image projected across everything we offer from chips to turnkey projects. Innovation, quality, experience and reliability are the common denominators behind our name in all of our businesses. One of the most important tools we have for maintaining this consistent brand image is a comprehensive, worldwide corporate design system with an extensive internal support group. We do not use outside consultants. It gives everything we do, from product design to advertising and collateral materials to building architecture, a highly distinctive look of quality — the visual counterpart to the exacting, consistent standards to which all of our businesses work. To our customers, the Siemens corporate design system also visually unites our diverse global businesses and clarifies their relationship with each other. Used consistently throughout each company and around the world, the system reminds customers who they are doing business with and why.



IN WHAT WAY DOES DIVESTITURE REFLECT YOUR GLOBALIZATION STRATEGY?

To remain competitive in a global environment, we must position each of our businesses in top world rankings. Strategic divestments free up resources that can then be channeled into strengthening core activities or exploring promising new fields. We see these moves as a process of consolidation aimed at making the best even better and generating ever more economic value added. This, in turn, can only have a positive impact on our global brand image.

IN WHAT WAY DOES ACQUISITION REFLECT YOUR GLOBALIZATION STRATEGY AND HOW WILL IT AFFECT YOUR GLOBAL BRAND IMAGE?

Acquisitions, like divestments, are part of our growth-oriented portfolio strategy that targets steadily improving profits. A third pillar of this strategy is building up new activities that have enormous potential. For example, Siemens Financial Services, formed in 1997 to unite and leverage our financial expertise across the whole of Siemens. All aspects of our portfolio strategy focus our global drive and ultimately enhance our global brand image. Siemens is fortunate to have one of the best-known company identities in the world. This powerful identity makes every Siemens product more visible and valuable in markets around the world. It instantly sets us apart from our competition. It speeds and enlarges the success of every Siemens venture, and allows each accomplishment to set the stage for even higher levels of achievement.

AS YOUR BUSINESS BECOMES GLOBALIZED, IS IT POSSIBLE TO MAINTAIN A CONSISTENT BRAND IMAGE EVERYWHERE YOU OPERATE?

By definition, the process of globalization shifts a company's focus from its traditional home markets — in our case Europe — to other emerging growth markets. While our business in Germany and Europe will continue to expand, an ever greater percentage of the total will be generated in the Americas and Asia-Pacific. Even though Asia is experiencing enormous difficulties right now, the region's long-term potential — particularly for the electrical and electronics industry — is staggering. As a global player, we must have an optimized regional mix to exploit this potential. So far as our brand image is concerned, our presence in many key countries for over one hundred years has given us a strong competitive edge. With our primary focus on capital goods, of

"Sempre digna de confiança, sempre inovadora. Essa é a Siemens."

MARTA, RIO DE JANEIRO — "Always dependable, always innovative. That's Siemens."

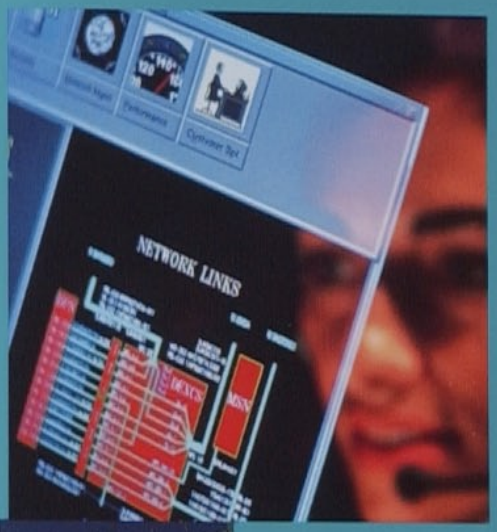
course, we aren't exactly a household name everywhere we operate. But in all of our markets, the name Siemens has a clear and consistent image: we are an industry leader that delivers quality single-source solutions.

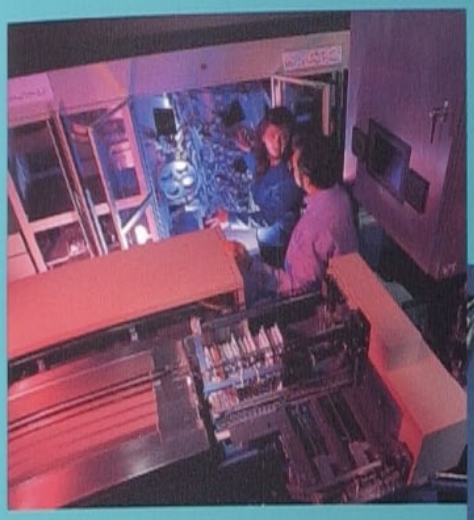
AS YOU EXPAND YOUR OPERATIONS ACROSS INTERNATIONAL BOUNDARIES, WHAT EFFECT DOES IT HAVE ON YOUR CORPORATE CULTURE AND, ULTIMATELY, ON YOUR GLOBAL BRAND?

As was customary for companies in the past, we generally relied on "exporting" our German-based culture. Today we are pushing true internationalization by embracing the diverse cultures that make up our workforce, shifting managers from region to region, building global project teams, stressing a global mindset. Ultimately we are aiming at creating a global corporate village and even a virtual company, where boundaries and time lose their traditional meanings.

SIEMENS HAS OVER 400,000 EMPLOYEES. HOW DO YOU MAINTAIN A UNIFIED VALUE SYSTEM IN SUCH A LARGE ORGANIZATION?

I think our basic principles are so universal that they can be readily transmitted and embraced at any location. We place our people first, stressing ongoing learning and open feedback; worldwide cooperation based on trust, personal integrity, mutual respect and open communication; good corporate citizenship; a climate of innovation; absolute focus on our customers; excellent leadership; and the drive for sustainable success. These clear guidelines enable our people to preserve the Siemens image yet respect local diversity.





IN WHAT WAY DOES SIEMENS PROMOTE INNOVATION AND WHAT ROLE DOES IT PLAY IN BUILDING THE GLOBAL BRAND?

Innovation is our lifeblood. To ensure we keep at the cutting edge in our industry, we dedicated more than $4.8 billion to R&D last year, making us one of the industry's most research-intensive companies. More than 45,000 people work in R&D worldwide, and 70 percent of our sales are generated by products less than five years old. We are the top patent holder in Germany, number two in Europe, and among the top 25 in the U.S. Our innovation competition last year was conceived to tap our vast international pool of talent: more than 30,000 worldwide employees submitted over 6,000 entries. It not only highlighted our global resources and produced immediate marketable ideas, but also generated a keen sense of employee identity with the company and further boosted brand awareness in our markets.

We also bestow the Inventor of the Year Award and the annual Siemens Environment Prize. The 13 inventors honored in 1997 have over 350 patents and registrations to their credit. In last year's environment competition, employees in 25 countries entered 215 projects — again showing the broad international range of talent and interest. The impact of these initiatives is enormous. Our multifaceted global network is proving to be an unusually rich source of ideas we can draw on to enhance our competitive strength.

DOES BEING ACTIVE IN THE COMMUNICATIONS BUSINESS HELP YOU IN BUILDING YOUR GLOBAL BRAND? IN WHAT WAY?

Telecommunications has remained a core Siemens specialty and today contributes roughly 25 percent of our total sales. Yet unlike telecom companies, which customers everywhere perceive as part of their daily lives, we tend to remain in the background providing the basic equipment, systems and networks. In recent years, though, we have gained more widespread brand recognition with our business phone systems, mobile telephony networks and cell phones, and by expanding visibly high-growth markets. Yet it certainly isn't as easy to project a brand name for things like power grids, fiberoptic telecom networks and industrial automation systems as it is for cars, baby food or

"Qualität und Kunde stehen bei Siemens an erster Stelle."

MARTIN, MUNICH — "Siemens puts quality and customers first."

detergent. One of the things that is helping us build our global brand is our latest worldwide advertising campaign. Using the theme, "We're Siemens. We can do that.", the campaign positions Siemens as a dynamic, globally active, successful company whose capabilities, experience and technology make a huge impact on almost every walk of life, and a company which knows how to combine these abilities to produce a synergistic effect that benefits not only its customers, but the public in general.

SIEMENS ESPOUSES A "THINK GLOBAL, ACT LOCAL" PHILOSOPHY. HOW DOES THIS PHILOSOPHY IMPACT YOUR MARKETING AND BRAND-BUILDING EFFORTS IN NEW AND EMERGING MARKETS?

Our emphasis is on meeting local needs in new and emerging markets such as Eastern Europe and Asia. To be successful today, the market virtually demands that companies act locally. Our approach initially entails forming joint ventures with local companies. Once such partnerships have proven successful, Siemens generally enjoys a high degree of acceptance in the country, with brand recognition often a welcome side effect. When a national Siemens company is then established, customers are likely to be familiar with the Siemens name. We feel the "think global, act local" mentality not only best serves the interests of the emerging markets but also has a positive impact on our marketing and brand-building efforts.

HOW DO YOU WANT THE GLOBAL MARKETPLACE TO PERCEIVE THE SIEMENS BRAND? WHAT ROLE DO YOU, AS CEO, TAKE IN SHAPING THAT PERCEPTION?

We want people around the world to perceive Siemens as a provider of life technologies — products, systems, and entire infrastructures that are essential for people and societies everywhere. Whether you turn on a light, ride a commuter train, have an x-ray or pick up the phone — we want you to be aware of the company that improves the quality of your life. Having a strong brand identity is a valuable marketing asset. The way Siemens is perceived is really shaped by the actions of all our people, and by how well we serve our customers and ultimately the public. Everyone who works for Siemens has a responsibility to protect, maintain and further enhance the strength of this important asset.

Global Brands in Today's Wired World

Main Content Area
This large area is used for the primary content of the page, and contains a combination of type and photography. It features a graphic headline, which can be either static or animated.
Shoulder Content Area
This left column is used for links to sublevels of the section, call-outs, and new or timely content.
U.S. Office Locations
Exceeding Expectations

For companies looking to build and leverage global brands, the World Wide Web is rapidly attaining a level of importance comparable to that of advertising, public relations, facility appearance, pricing, customer service and other traditional brand components. Small wonder that global spending on outsourced Internet services has quadrupled since 1995 and is expected to double again in 1998.

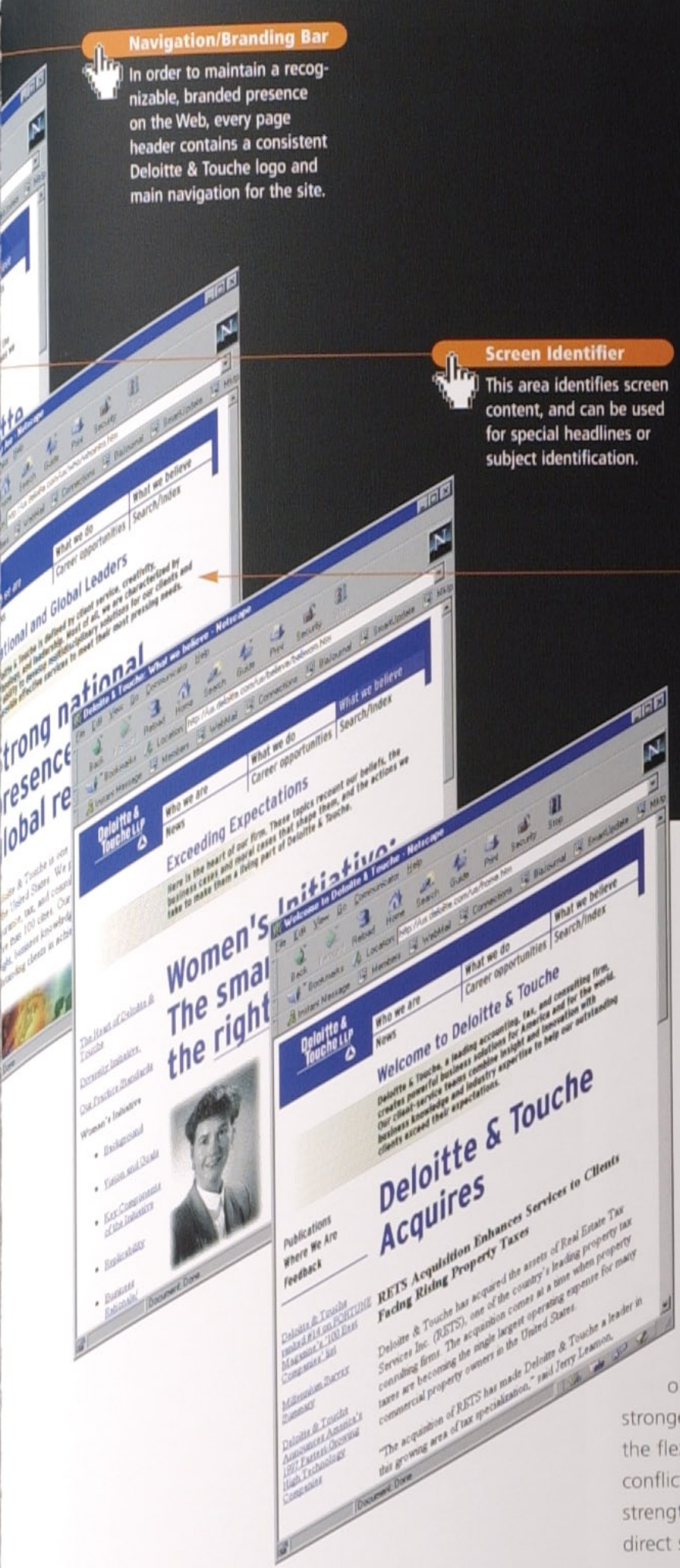
Behind the Web's remarkable growth is its unique ability to seamlessly integrate brand messages. On the Web, information and transactions flow through the same electronic channel, merging customer communication and experience and dramatically heightening the impact of both brand and corporate identity. According to a Lippincott & Margulies survey of Web sites maintained by Fortune 200 companies, those industries taking fullest advantage of the Web's interactive capabilities include retailing, financial services, transportation, automotive sales and distribution, and technology.

But the Web also imposes new demands on established brands. In a world of intensified global competition, the Web truly levels the playing field. A small retailer with a single location can stake out as much electronic "real estate" and speak with as loud a voice as a Wal-Mart or a J.C. Penney. And because the Web transcends geography, it makes every brand global by definition.

In this new arena, the importance of conveying clear messages that "cut through the clutter" is greater than ever. The challenge facing companies today isn't simply to establish a presence on the Web — virtually anyone can do that — but to successfully negotiate the transition to a wired world. How can a company use the Web in a way that ensures its messages will be delivered with maximum clarity and impact? What are the most effective approaches to creating and managing Web content? How can various lines of businesses be integrated within a single electronic venue? These are the questions Lippincott & Margulies has addressed in working with the companies highlighted on these pages.

Supporting a new positioning

Deloitte & Touche's original Web site had been created years earlier, when the firm was smaller and the Internet's potential as a communications and marketing tool was


Navigation/Branding Bar
In order to maintain a recognizable, branded presence on the Web, every page header contains a consistent Deloitte & Touche logo and main navigation for the site.
Screen Identifier
This area identifies screen content, and can be used for special headlines or subject identification.
Section Overview
This general introduction to each major section of the site gives users a quick overview of the content. Contained within a stylized graphic, it also reinforces the site's look and feel.
Deloitte & Touche
Welcome to Deloitte & Touche
Acquires
Exceeding Expectations
Women's Initiative

little understood. After repositioning Deloitte & Touche as a world-class professional services firm with in-depth business knowledge and industry expertise, Lippincott & Margulies created a dynamic new site that targets key audiences and projects the full scope of the firm's capabilities. Detailed Web design guidelines and templates distributed firmwide enable Deloitte & Touche to modify and expand its site without relying on external consultation. The result: a versatile architecture that can expand along with the firm's growth. (www.us.deloitte.com)

Conveying diversity and consistency

With the rapid consolidation of the automotive retailing industry, United Auto, the nation's second largest automotive retailer, needed to present a stronger national brand focus, while still allowing dealers the flexibility to market regionally. This was the apparent conflict that management faced as they sought to strengthen the chain's market position by leveraging the direct sales and marketing potential of the Internet. To

bridge the gap, our Interactive Group created a Web site that reflects the brand image of United Auto as a corporate entity, while also providing templates which can be customized by dealers. By maintaining a bold, consistent schematic for branding and navigation, dealers have access to leading tools for used-car inventory search, new-car quotes, and parts and services order forms — and the benefit of a strong brand link to the parent company. With all United Auto dealer sites linked visually and technically to the corporate site, a truly national online retailer is close at hand. (www.unitedauto.com)

Conquering geography

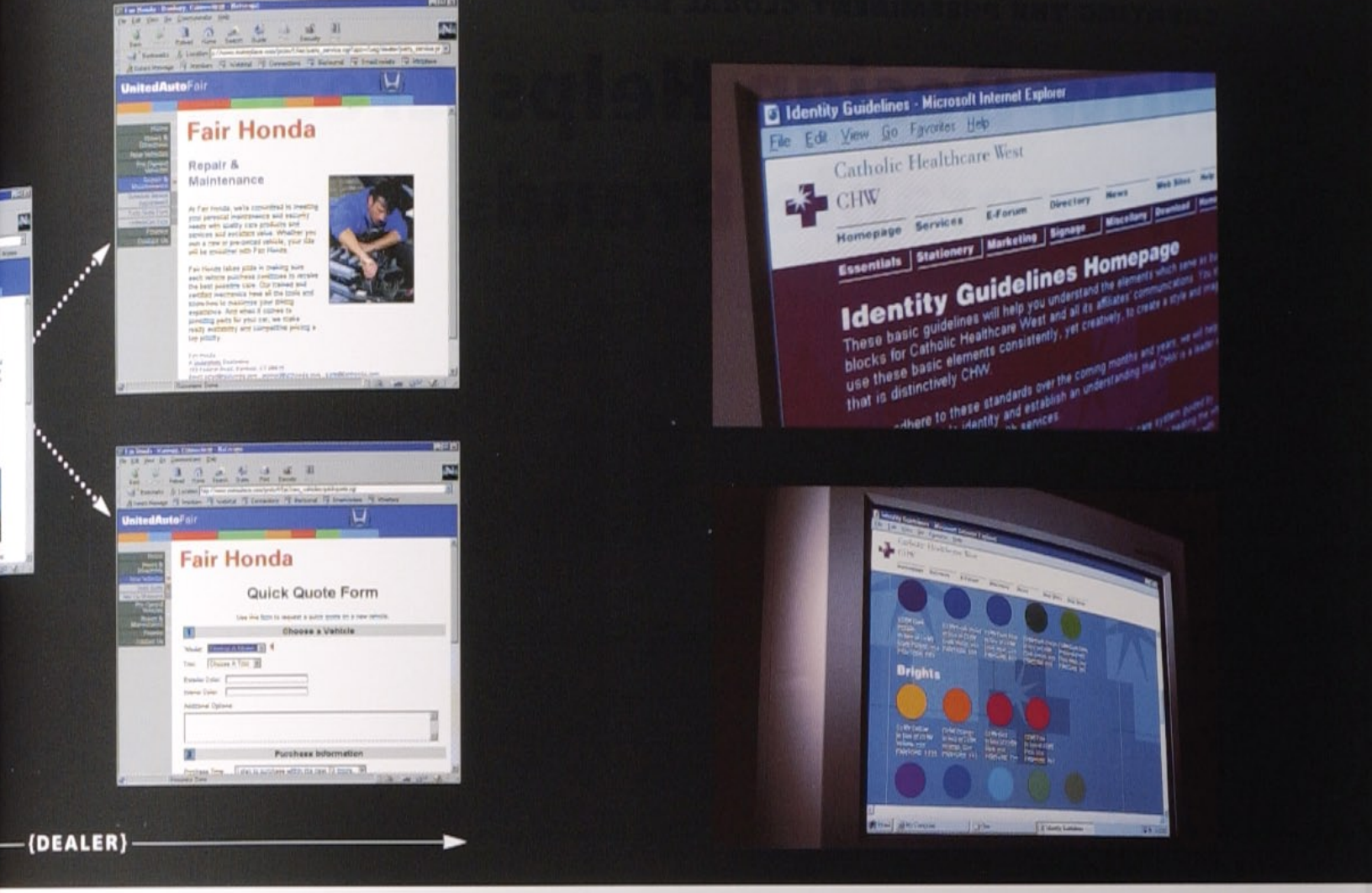
Internal information networks, or intranets, provide corporations with a uniquely effective means of conveying and reinforcing identity messages and managing brands throughout the organization. Within large global corporations, this capability is demonstrated with particular impact. Consider IBM, which produces over 15,000 pieces of sales promotion literature a year. To achieve a consistent worldwide appearance and standard of quality, the company asked Lippincott & Margulies to develop a new design

Managing the e-brand

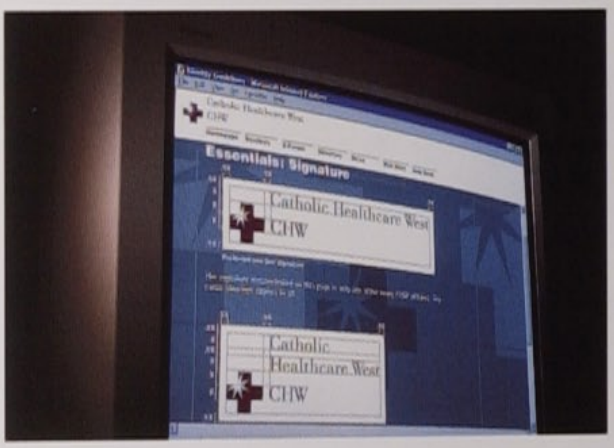
First there was e-mail. Then came e-commerce. Now it's the age of the e-brand.

An "e-brand" image is the sum of all the information about a product, service or company that's communicated to customers via the Internet, from pricing and product features to visual identity and ease of use. E-branding is a powerful vehicle for helping a company project a consistent message and look in the face of increased global competition.

E-brand management requires that a company strategically consider the Internet's most appropriate role in its core businesses — and then create a design framework to support this strategy. Rather than simply design Web sites, Lippincott & Margulies seeks to design a framework and provide the tools for managing an e-brand: guidelines, templates and design elements that enable a company to continually enlarge and modify its Web site independent of outside consultants. Result: a dynamic, evolving Web site that is continually adaptable to changing customer expectations and corporate needs.



system that would serve all markets and locations. A corporate identity site on IBM's intranet explains the new standards and their underlying rationale for communications and design professionals in more than 160 countries.



Projecting a unified brand image in a time of change

As consolidation and competition transform the health care industry, nonprofit providers face pressure to find new ways to project a compelling identity. The nation's fifth largest hospital system, Catholic Healthcare West needed a unified brand image that would attract new strategic partners and communicate the system's humanitarian objectives. At the same time, it was important to preserve the individual identities of CHW's 39 hospitals, located throughout three states. As part of a comprehensive market position strategy, Lippincott & Margulies developed an identity system linking the CHW brand and new logotype with the names of individual hospitals. The new system is the centerpiece of CHW's intranet, and is easily accessible to the CHW network of hospitals. Templates and guidelines can be easily downloaded and applied by professional designers and general staff.

How Design Helps Create Memorable Brands

BY KENNETH D. LOVE, PRESIDENT AND CREATIVE DIRECTOR

Great design and great brands go together. The public makes the connection.

The powerful role design plays in a brand's image is illustrated by the Penguin book story, well known in publishing circles and mentioned recently in a *New York* magazine article. While being held hostage in Beirut, the Anglican clergyman Terry Waite requested some reading material. His jailer spoke very little English, but Waite managed to indicate he'd like to read a book. He drew a penguin with an oval around it, telling his captor, "Find any book with this symbol and it will be a good one." That kind of reputation and recognition is available to every company. All that is needed is a dedicated strategy for building a brand.

Design doesn't make the brand any more than clothes make the man — or woman. But as the Penguin anecdote illustrates, distinguished brands are synonymous with memorable design and for good reason. In the public's mind, design is interwoven with a brand's personality, representing its character to an audience that is awash in a mounting tidal wave of images. With more mediums for the message than ever in the history of modern times, the potency of good design extends well beyond aesthetics. In companies where it is valued by senior management, design is a bona fide strategic tool.

All the physical components of a company, including products, promotional materials, packaging, Web site presentation and architecture, combine to form an overall impression of some kind, which suggests that a synchronized design program is an efficient way to communicate a brand's promise. Managed cohesively, design serves as a growth lever, making the brand understandable to a broad cross-section of domestic and global audiences. Similarly, as the construct of a brand's overall presence, design can be a prudent use of communications budgets.

What great design won't do is make up for a flawed brand strategy, mask a subpar product or service, excuse inadequate customer relations or counter an inept advertising campaign. Nike has learned this the hard way, seeing its brand image tarnished by accusations of Asian labor exploitation.

For design to make the maximum contribution to a brand's acceptance in the marketplace today, a company's chief brand steward, the CEO, must assign the function of design a priority rank. As *Business Week*'s editorial page editor, Bruce Nussbaum, points out, too few companies, maybe 20 to 30 percent, really utilize design properly, if at all. "If design is a peripheral function, the company will

only get about five percent of what design can deliver," said Nussbaum in the Corporate Design Foundation's publication, @ *Issue*.

Many components constitute a brand's identity, beginning with the assumption of quality. It is the cumulative sum of tangible and intangible identity elements that creates a brand's distinctive tone and manner. When managed systematically for all it is worth, a powerful and valuable brand identity reverberates to the corporation over all. A brand name becomes a keystone design element when transformed into a distinctive logotype. Coca-Cola's script is recognized the world over — even when translated into the native tongue of far-flung foreign lands.

Thanks to Owens-Corning's pink panther, a brand can legally "own" a color. Could UPS be anything but brown? Is there any mistaking a Tiffany package? As with a shape, sound or fragrance, a brand's color can be registered as a trademark when it distinguishes a particular product.

Symbols are the world's design cues. They facilitate communications, breaking down linguistic and cultural barriers and reinforcing a brand's core attributes that appeal to multiple audiences. Nike's Swoosh, Texaco's Star, FTD's Mercury Man, Apple's Apple, Starbucks' Mermaid — these symbols stand on their own because they are visual representations of their brand's essential character and personality, and they have been promoted with consistency and assertiveness.

The form and function of a product or the plan and look of a retail outlet enhance accessibility and use, and provide a three-dimensional context that invites the user to experience the brand's positioning.

A brand's design vocabulary — the selection of secondary colors, typography, graphic elements and style — combine to reiterate core messages.

Intangible elements also build a brand's image. The pleasure of reading a Penguin novel, the smell of Starbucks coffee on a lazy Saturday morning, how Siemens' employees bring the corporation's values to life, the memories of good times drinking Coca-Cola. These are personal experiences that accumulate to form brand expectations.

The companies profiled in this issue of *Sense* are vastly different. Yet the CEOs share an unqualified understanding of the powerful role design and identity play in creating, furthering and sustaining memorable world-class brands in the global marketplace.

LIPPINCOTT & MARGULIES CLIENT LIST

We are proud to list here some of the companies with whom we have been associated since 1945.

A&P
ABC Television
Allstate
American Express
Amtrak
Arch Communications
Archstone Communities
ARCO
AT&T
Banco Sud Americano
Bancroft
BankAtlantic
Barclays Bank
Baskin-Robbins
Bausch & Lomb
Becton Dickinson
Bell Atlantic
BellSouth
Beneficial Finance
Blue Cross & Blue Shield of Massachusetts
Blue Cross of California
Burlington Northern
CaliforniaMart
Canadian Pacific
Capital Holding
CapitalOne
Carnegie Hall
Catholic Healthcare West
Cendant
Centria
Chevron
Chrysler Corporation
CIBC Wood Gundy
CITGO
Citibank
Coca-Cola
Comerica
Conectiv
Conoco/breakplace
Consolidated Edison
Continental Airlines
Cordant Technologies
D&S Supermarkets
Daewoo Motors
Del Monte
Deloitte & Touche
Dimon
Doosan Group
Duracell
Dyneon
Eaton
Enbridge
Enron
Enterprise Rent-A-Car
Experian
Exxon
FiberMark
Finova
Firestone
First Union
Fluor
FMC
Fraser Papers
GE Capital
General Motors
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Hertz
Hoechst Celanese
Hollinger International
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International Paper
Isuzu Motors
Johnson & Johnson
The Limited
LOEB
Marine Midland Bank
Marriot
The McGraw-Hill Companies
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NBC
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New York Palace Hotel
Nissan
NYNEX
OG&E
Old Kent Financial
Oldsmobile
Olive Garden
PacifiCare
Pacific Bell
Parke-Davis
Pathmark
Payless ShoeSource
Pemex
Pentair
Petro-Canada
Pizza Hut
Price Ventures
Primerica
The Principal Financial Group
RCA
Red Lobster
Rede Globo
Repsol
Ryder System
The St. Paul Companies
Salomon Brothers
Samsung Group
SCANA
Scotiabank
Scripps Health
Sears Roebuck and Co.
ServiStar
Shell Oil
Showbiz Pizza Time
Signature Flight Support
Sonic Drive-Ins
SONY Music
Southern Company
Sprint
Standard & Poor's
Sultan Bin Abdulaziz Foundation
Sunoco
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Telmex
TELUS
Tenneco
Texaco
3M
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Unocal
UNUM
Western Union
Xerox
Yellow Freight Systems

Lippincott & Margulies, founded in 1945, pioneered the practice of identity and image management. The firm assists companies in shaping the perception of their organization, retail businesses, services and products through the development of proprietary communications strategies and identity systems. Our principal services include:

- **Image Analysis and Identity Planning**
- **Name & Name Systems**
- **Design & Design Systems**
- **Identity & Image Management**
- **Implementation & Introduction**
- **Integrated New Product & Service Development**
- **Electronic and Interactive Media Services**
- **Information Design**

For your convenience, a copy of this reply card may also be returned to Lippincott & Margulies via **fax 212 754 2591.**

We also welcome your comments and queries via **e-mail at nms@lippincott-margulies.com.**

Please visit our **Web site at: http://www.lippincott-margulies.com.**

I would like more information about how Lippincott & Margulies helps a company grow through corporate and brand identity management:

- ○ Please add my name to your mailing list.
- ○ Please have someone contact me.

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Please send me the following information:

- ○ **Sense 94**
  Return on Image:
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- ○ **Sense 93**
  Employees and Image:
  The new corporate ambassadors in the marketplace.

Briefcases

- ○ AT&T
- ○ Catholic Healthcare West
- ○ Conoco/breakplace
- ○ Continental Airlines
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